Study for the European Commission, Directorate General for Internal Market and Services

Main Developments in the Postal Sector (2010-2013)

Country Reports

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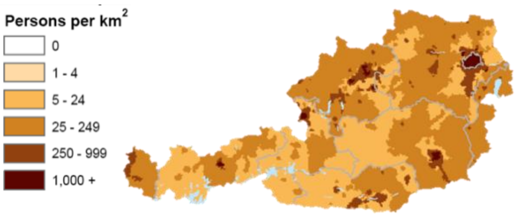
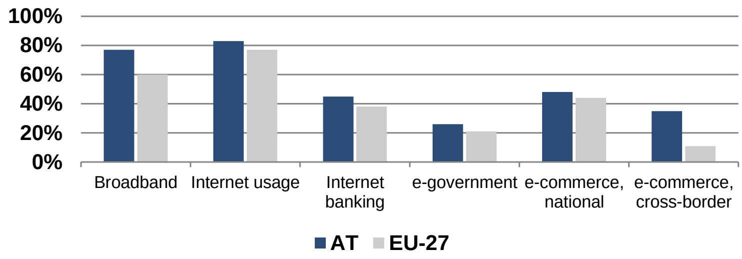
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Bad Honnef, August 2013

Contents

AUSTRIA

A. Country facts

Total population (2012)	8.4m	**Austria** 
Population density (2012)	101 / sqkm	
Urbanisation rate (2011)	68%	
GDP growth rate (AT / EU-27)	2010: 2.1% (-0.3%) 2011: 2.7% (0.1%) 2012: 0.8% (1.6%)	
GDP per capita in PPS (2011) (in % EU-27 average)	32,400 (129%)	
Transparency International CPI 2012 Score (Max. 100)	69	
ICT indicators (2012)		
Online purchase per capita	EUR 825	Average growth rate (2007-2011): 32%

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	Federal Ministry for Transport, Innovation and Technology
Ministry for ownership of PPO	Ownership: Federal Ministry for Finance; represented by ÖIAG (Österreichische Industrieholding AG)
National regulatory authority	The Austrian Regulatory Authority for Broadcasting and Telecommunications

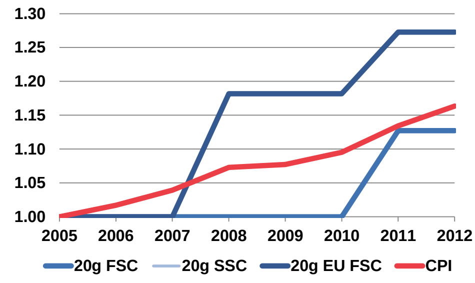
B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 3	Appointed by: Other
NRA resources, 2012	Budget:	Professional staff: 4.28
NRA authority to levy fines	Yes	Limit: 30000
NRA authority to order remedies	Yes	
NRA right to data from USP	Compliance data: Not for any postal services; Statistics: Not for any postal services	
NRA right to data from non-USPs	Compliance data: Not for any postal services; Statistics: Not for any postal services	

B.3 National Competition Autority			
National competition authority	Federal Competition Authority		
Primary authority for competition rules	National competition authority (NCA)		
NRA/NCA cooperation	Share data: No	Regular consult: No	Coord agmt: No
NCA decisions since 2009			
State aid cases			

B.4 Scope of Universal Service			
Service	Ensured	Price regulated	Service standards
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	Yes	Yes	Yes
Bulk advertisements	Yes	Yes	Yes
Newspapers, magazines, etc.	Yes	Yes	No
Non-priority correspondence	No	---	---
Single piece parcels	Yes	Yes	Yes
Bulk parcels	Yes	Yes	Yes
Delivery frequency for LP	5 days per week		
Delivery frequency for parcels	5 days per week	Delivery point: ---	

B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: Other	Second agency: ---	
EU v. UPU law, intra-EU	NA		
EU v. UPU law, extra-EU	NA		
Enforcement of Art. 13	Cost based TDs: Unknown, no information	Related to QoS: Unknown, no information	Transparent: Unknown, no information
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	Unknown, no information		
NRA prohibits discrimination between inbound mail from different EU mailers?	---	TD regimes: ---	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	Unknown, no information	TD regimes: ---	
Overalll net gain/ loss due to TDs not aligned to domestic postage	No answer		

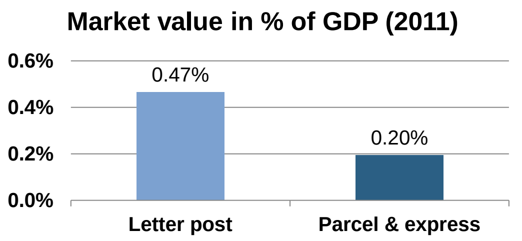
B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): ---	Volume (%) : ---	
Choice between market forces, designation, and procurement	Study: No	National USP appointed by legislation: Yes	
Method of ensuring US	Mkt force (%): 0	Designation (%): ---	Procurement (%): ---
Households not receiving US	Letter post (% pop): 0	Parcels (% pop): 0	
Net cost of US0 in 2012	Pct USP exp: ---	Net cost study: No	
USO financed from public funds	No		
USO financed from compensation fund	Authorized: Yes	Established: No	

B.7 Universal service indicators			
Price trend	**2010**	**2013**	
20g FSC, domestic	EUR 0.55	EUR 0.62	
20g SSC, domestic			
20g FSC, EU	EUR 0.65	EUR 0.70	
5kg parcel, domestic	EUR 5.70	EUR 5.70	
5kg parcel, cross-border (lowest tariff) (lowest tariff)		EUR 16.25	
Quality of service	**2010**	**2012**	**USP customer satisfaction index**
Domestic target (D+1)	95%	95%	2010: 94% 2011: 94% 2012: 94%
Performance (D+1)	95.4%	96.0%	
Postal outlets (total)	1,834	1,927	
Postal outlets per 10,000 inhabitants	2.19	2.28	
Share post offices	38.8%	28.4%	

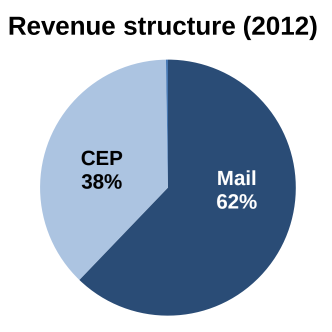
B.8 Legal Treatment of Competitive Services			
Special tariffs are transparent and non-discriminatory?	Bulk letters: Required by law and verified in practice	Direct mail: Required by law and verified in practice	Bulk parcels: Required by law and verified in practice
Special tariffs are available to other postal operators?	Bulk letters: Required by law and verified in practice	Direct mail: Required by law and verified in practice	Bulk parcels: Required by law and verified in practice
Licence required within US area	Licence required for provision of some services with the universal service area		
Use of potentially restrictive authorisation conditions	Univ. servs: No	Quality conditions: Yes	Competence: No
Access to postal infrastructure by competitors	Addr. database: ---	Post office boxes: ---	Delivery boxes: Yes
VAT: USP services exempt	other;		
Customs: USP services subject to UPU customs rules	---		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: No	USP accepts inbound mail from EU/EEA ETOEs?: No	
Intra-EU remail restrictions	ABA remail: Unknown, no information	ABC remail: Unknown, no information	
Labour law: special rules in postal sector	No		

B.9 Protections of Users		
Protection of users by law	Yes	Postal laws and/or regulations include user protection provisions.
Implementing authority(ies)	Postal NRA enforces user protection provisions for postal services	
Users of private operators covered	Within US: Yes	Outside US: Yes
Publication of annual statistics	By USP: No	By NRA: No
User complaints to USP reviewed, 2012	Percent of complaints (%): 59	

C. Market facts

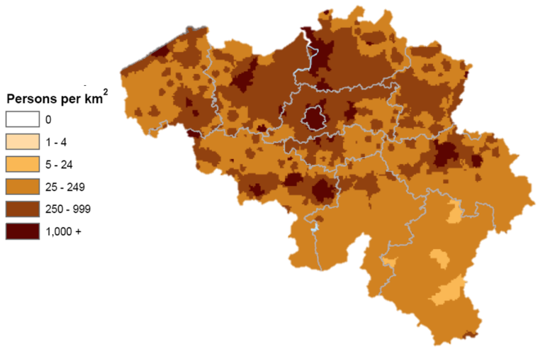
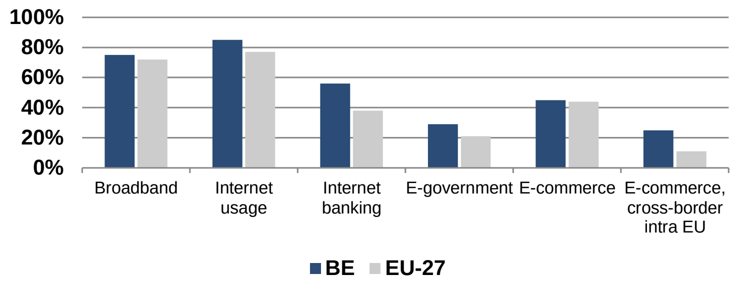
C.1 Market size and demand (2011)		
Letter post items per capita (EU-27 average)	331 (164)	
Share C2X (revenue/volume)	n/a	
Share B2X (revenue/volume)	n/a	
Parcel & express items per capita	18	
Share C2X (revenue/volume)	n/a	
Share B2X (revenue/volume)	n/a	
	Volume	**Main developments since 2007**
Domestic and inbound cross-border letter post	2,786m	Average growth rate 2007-2011: -1.4%
Outbound cross-border letter post	n/a	
Domestic parcel & express	148m	Source: Austrian Post
Outbound cross-border parcel & express	n/a	

C.2 Market structure and key market players			
	TOP3 Market share	**Perceived competition**	**Key players**
Domestic letter post	100%	NRA: n/a USP: Low	Austrian Post, Feibra (subsidiary of Austrian Post), Mail Austria
Outbound cross-border letter post	n/a	NRA: n/a USP: Intense	Austrian Post, DHL Global Mail, Spring, Asendia
Domestic parcel & express (total)	n/a	NRA: n/a USP: Intense	Estimated USP market share: n/a
B2C	n/a	NRA: n/a USP: Intense	Austrian Post (75%), DHL, DPD Austria, GLS
B2B	n/a	NRA: n/a USP: Intense	Austrian Post (22%), DHL, DPD Austria, GLS
Outbound cross-border parcel & express	n/a	NRA: n/a USP: Intense	Österreichische Post AG, DHL, DPD Austria, UPS

C.3 Österreichische Post AG (2012)		
Legal status	plc IPO 2006	
State ownership	52.8% (via ÖIAG) 47.2% free float	
Total revenue	EUR 2,366m	
Share national revenue	73%	
EBIT margin total / mail	7.7% / 11.5%	
Employment, total (headcount / FTE)	25,042 / 23,181	
Share civil servants (headcount)	40.3%	
Share part-time	n/a	
Share wage costs on total costs	48.7%	

BELGIUM

A. Country facts

Total population (2012)	11.1m	**Belgium** 
Population density (2012)	363 / sqkm	
Urbanisation rate (2011)	98%	
GDP growth rate (BE / EU-27)	2010: 2.4% 2011: 1.8% 2012: -0.2%	
GDP per capita in PPS (2011) (in % EU-27 average)	29,900 (119%)	
Transparency International CPI 2012 Score (Max. 100)	75	
ICT indicators (2012)		
Online purchase per capita	EUR 364	Average growth rate (2007-2011): 18%

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	Deputy Prime Minister and Minister of Economy, Consumer Affairs and the North Sea
Ministry for ownership of PPO	Minister of Public Enterprises and Development Cooperation
National regulatory authority	Belgian Institute for Postal Services and Telecommunications

B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 4	Appointed by: Council of Ministers or Prime Minister
NRA resources, 2012	Budget: 2500000	Professional staff: 7
NRA authority to levy fines	Yes	n/a
NRA authority to order remedies	Yes	
NRA right to data from USP	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	
NRA right to data from non-USPs	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	

B.3 National Competition Autority			
National competition authority	Competition Council		
Primary authority for competition rules	National competition authority (NCA)		
NRA/NCA cooperation	Share data: Yes	Regular consult: Yes	Coord agmt: No
NCA decisions since 2009	2012-P/K-32 - Publimail/Bpost		

State aid cases	SA.14588 - Mesures en faveur de La Poste belge N1/2013 - State compensations to bpost for the delivery of public services over 2013-2015		

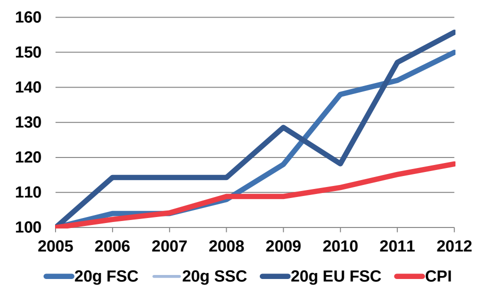
B.4 Scope of Universal Service			
Service	**Ensured**	**Price regulated**	**Service standards**
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	Yes	Yes	Yes
Bulk advertisements	Yes	Yes	No
Newspapers, magazines, etc.	Yes	No	Yes
Non-priority correspondence	Yes	Yes	Yes
Single piece parcels	Yes	Yes	Yes
Bulk parcels	Yes	Yes	No
Delivery frequency for LP	5 days per week		
Delivery frequency for parcels	5 days per week	Delivery point: Parcels must be delivered without charge to addressee	

B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: All cross-border services	Second agency: The UPU Acts are signed by the Belgian State and the obligations of the Act should be respected by the ¨designated USP, in casus bpost. The provision of executing the obligatio of the UPU cenvention is foreseen in the management contract (a	
EU v. UPU law, intra-EU	EU law apply even if contrary to UPU provisions		
EU v. UPU law, extra-EU	EU law apply even if contrary to UPU provisions		
Enforcement of Art. 13	Cost based TDs: Unknown, no information	Related to QoS: Yes	Transparent: No
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	Unknown, no information		
NRA prohibits discrimination between inbound mail from different EU mailers?	---	TD regimes: ---	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	Unknown, no information	TD regimes: ---	
Overalll net gain/ loss due to TDs not aligned to domestic postage	No answer		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): ---	Volume (%) : ---	
Choice between market forces, designation, and procurement	Study: Unknown, no information	National USP appointed by legislation: Yes	
Method of ensuring US	Mkt force (%): ---	Designation (%): ---	Procurement (%): ---
Households not receiving US	Letter post (% pop): 0	Parcels (% pop): 0	
Net cost of US0 in 2012	Pct USP exp: ---	Net cost study: Yes	
USO financed from public funds	No		
USO financed from compensation fund	Authorized: No	Established: No	

B.7 Universal service indicators

Price trend	2010	2013
20g FSC, domestic	EUR 0.69	EUR 0.77
20g SSC, domestic		
20g FSC, EU	EUR 1.00	EUR 1.13
5kg parcel, domestic	EUR 7.70	EUR 8.70
5kg parcel, cross-border (lowest tariff)	EUR 13.00	EUR 16.20



Quality of service	2010	2012	USP customer satisfaction index
Domestic target (D+1)	90%	90% (2011)	2010: 82% 2011: 87%
Performance (D+1)	93.3%	92.3% (2011)	
Postal outlets (total)	1,394	1,375 (2011)	
Postal outlets per 10,000 inhabitants	1.29	1.25	
Share post offices	49.5%	49.2% (2011)	

B.8 Legal Treatment of Competitive Services

Special tariffs are transparent and non-discriminatory?	Bulk letters: Required by law and verified in practice	Direct mail: Required by law and verified in practice	Bulk parcels: Required by law but not verified in practice
Special tariffs are available to other postal operators?	Bulk letters: Required by law and verified in practice	Direct mail: Required by law and verified in practice	Bulk parcels: Required by law but not verified in practice
Licence required within US area	Licence required for provision of some services with the universal service area		
Use of potentially restrictive authorisation conditions	Univ. servs: Yes	Quality conditions: Yes	Competence: Yes
Access to postal infrastructure by competitors	Addr. database: No	Post office boxes: No	Delivery boxes: Yes
VAT: USP services exempt	Single piece letters; single piece parcels; direct mail; newspapers/periodicals; bulk parcels; outbound letter post; outbound parcel post;		
Customs: USP services subject to UPU customs rules	Inbound letters and large envelopes; inbound small packets; inbound parcels (UPU inward land rates); inbound parcels (non-UPU charges); inbound express mail items;		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: No	USP accepts inbound mail from EU/EEA ETOEs?: Unknown, no information	
Intra-EU remail restrictions	ABA remail: Unknown, no information	ABC remail: Unknown, no information	
Labour law: special rules in postal sector	Yes		

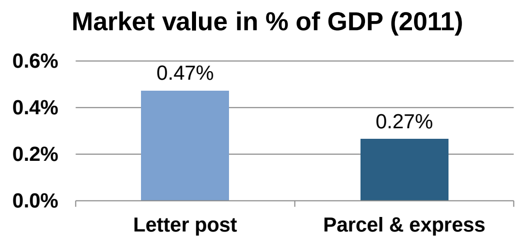
B.9 Protections of Users

Protection of users by law	Yes	Postal laws and/or regulations include user protection provisions.
Implementing authority(ies)	Both NRA and NCPA enforce user protection provisions for postal services	
Users of private operators covered	Within US: Yes	Outside US: Yes
Publication of annual statistics	By USP: No	By NRA: No
User complaints to USP reviewed, 2012	Percent of complaints (%): ---	

C. Market facts

C.1 Market size and demand (2011)

Letter post items per capita (EU-27 average)	233 (164)
Share C2X (revenue/volume)	n/a
Share B2X (revenue/volume)	n/a
Parcel & express items per capita	n/a
Share C2X (revenue/volume)	n/a
Share B2X (revenue/volume)	n/a



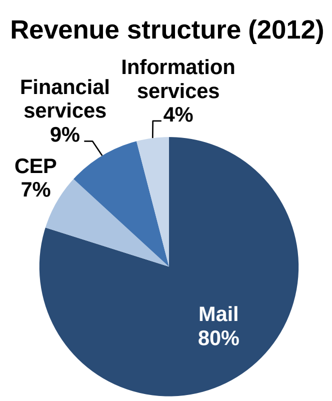
	Volume	Main developments since 2007
Domestic and inbound cross-border letter post	2,560m	Average growth rate 2007-2011: -2.5%
Outbound cross-border letter post	n/a	
Domestic parcel & express	n/a	
Outbound cross-border parcel & express	n/a	

C.2 Market structure and key market players

	TOP3 Market share	Perceived competition	Key players
Domestic letter post	100%	NRA: Marginal USP: n/a	bpost
Outbound cross-border letter post	n/a	NRA: Moderate USP: n/a	bpost DHL Global Mail Spring (TNT Post) Asendia (La Poste / Swiss Post)
Domestic parcel & express (total)	62%	NRA: Substantial USP: n/a	Estimated USP market share: 10-15%
B2C	n/a	NRA: Intense USP: n/a	bpost, PostNL, DHL, FedEx, UPS
B2B	n/a	NRA: Intense USP: n/a	TNT Express, DHL, FedEx, UPS
Outbound cross-border parcel & express	n/a	NRA: Intense USP: n/a	DHL, FedEx, TNT Express, UPS

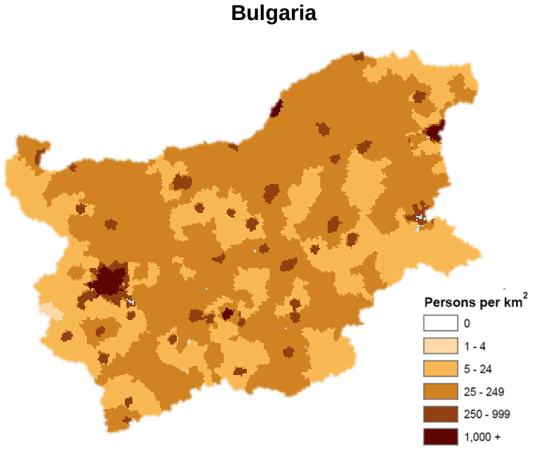
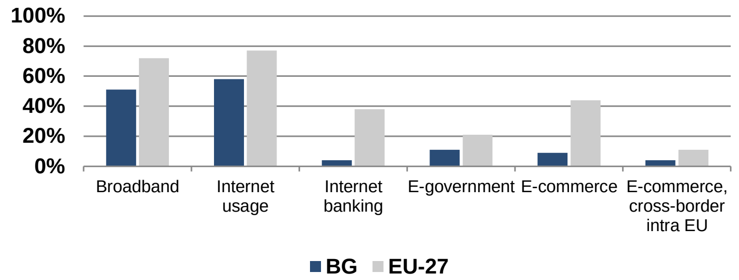
C.3 bpost (2012)

Legal status	plc IPO 2013
State ownership	50% plus 488 shares Free float 29.9% CVC (via Post Invest Europe) 19.7% bpost's employees 0.5%
Total revenue	EUR 2,416m
Share national revenue	95.3%
EBIT margin total / mail	13.4% / n/a
Employment, total (headcount / FTE)	29,922 / 26,625
Share civil servants (headcount)	56.8%
Share part-time	30.3%
Share wage costs on total costs	51.3%



BULGARIA

A. Country facts

Total population (2012)	7.3m	
Population density (2012)	66 / sqkm	
Urbanisation rate (2011)	73%	
GDP growth rate (BG / EU-27)	2010: 0.4% 2011: 1.8% 2012: 0.8%	
GDP per capita in PPS (2011) (in % EU-27 average)	11,600 (46%)	
Transparency International CPI 2012 Score (Max. 100)	41	
ICT indicators (2012)		
Online purchase per capita	n.a.	Average growth rate (2007-2011): n.a.

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	Ministry of Transport, Information Technology and Communications
Ministry for ownership of PPO	---
National regulatory authority	Communications Regulation Commission

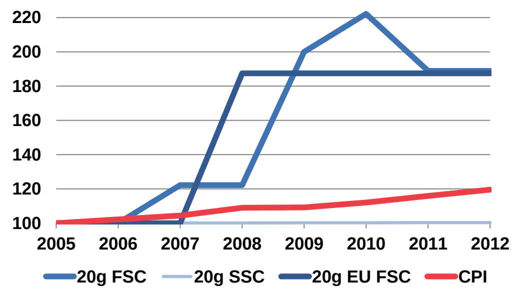
B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 5	Appointed by: Other
NRA resources, 2012	Budget: 192534	Professional staff: ---
NRA authority to levy fines	Yes	Limit: 1024,11797839111
NRA authority to order remedies	No	
NRA right to data from USP	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	
NRA right to data from non-USPs	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	

B.3 National Competition Autority			
National competition authority	Commission on Protection of Competition		
Primary authority for competition rules	National competition authority (NCA)		
NRA/NCA cooperation	Share data: Yes	Regular consult: Unknown, no information	Coord agmt: Yes
NCA decisions since 2009			
State aid cases			

B.4 Scope of Universal Service			
Service	**Ensured**	**Price regulated**	**Service standards**
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	No	---	No
Bulk advertisements	No	---	No
Newspapers, magazines, etc.	No	No	No
Non-priority correspondence	Yes	Yes	Yes
Single piece parcels	Yes	Yes	Yes
Bulk parcels	No	---	---
Delivery frequency for LP	5 days per week		
Delivery frequency for parcels	5 days per week	Delivery point: Parcels required only to be held at postal outlet nearest addressee	

B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: All cross-border services	Second agency: ---	
EU v. UPU law, intra-EU	UPU provisions apply except for EU competition and customs rules		
EU v. UPU law, extra-EU	UPU provisions apply except for EU competition and customs rules		
Enforcement of Art. 13	Cost based TDs: ---	Related to QoS: ---	Transparent: ---
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	---		
NRA prohibits discrimination between inbound mail from different EU mailers?	---	TD regimes: ---	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	---	TD regimes: ---	
Overalll net gain/ loss due to TDs not aligned to domestic postage	---		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): ---	Volume (%) : ---	
Choice between market forces, designation, and procurement	Study: No	National USP appointed by legislation: Yes	
Method of ensuring US	Mkt force (%): ---	Designation (%): 100	Procurement (%): ---
Households not receiving US	Letter post (% pop): ---	Parcels (% pop): ---	
Net cost of US0 in 2012	Pct USP exp: 39.6	Net cost study: No	
USO financed from public funds	No		
USO financed from compensation fund	Authorized: No	Established: No	

B.7 Universal service indicators			
Price trend	**2010**	**2013**	
20g FSC, domestic	EUR 0.51	EUR 0.43	
20g SSC, domestic	EUR 0.33	EUR 0.33	
20g FSC, EU	EUR 1.50	EUR 1.50	
5kg parcel, domestic	EUR	EUR 1.94	
5kg parcel, cross-border (lowest tariff)	EUR	EUR 22.90	
Quality of service	**2010**	**2012**	**USP customer satisfaction index**
Domestic target (D+1)	80%	80% (2011)	
Performance (D+1)	83.6%	88.1% (2011)	
Postal outlets (total)	3,436	3,453 (2011)	
Postal outlets per 10,000 inhabitants	4.54	4.69 (2011)	
Share post offices	86.8%	86.3% (2011)	

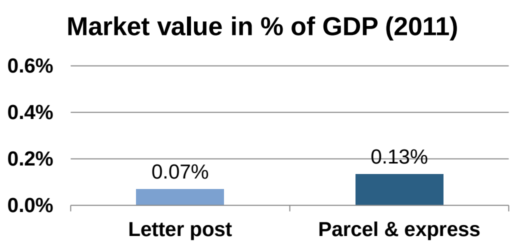
B.8 Legal Treatment of Competitive Services			
Special tariffs are transparent and non-discriminatory?	Bulk letters: Required by law and verified in practice	Direct mail: No answer	Bulk parcels: Required by law and verified in practice
Special tariffs are available to other postal operators?	Bulk letters: Required by law and verified in practice	Direct mail: No answer	Bulk parcels: Required by law and verified in practice
Licence required within US area	Licence required for provision of some services with the universal service area		
Use of potentially restrictive authorisation conditions	Univ. servs: No	Quality conditions: Yes	Competence: No
Access to postal infrastructure by competitors	Addr. database: No	Post office boxes: No	Delivery boxes: Yes
VAT: USP services exempt	---		
Customs: USP services subject to UPU customs rules	---		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: No answer	USP accepts inbound mail from EU/EEA ETOEs?: No answer	
Intra-EU remail restrictions	ABA remail: No answer	ABC remail: No answer	
Labour law: special rules in postal sector	No		

B.9 Protections of Users		
Protection of users by law	Yes	Both postal and consumer protection laws apply to postal users.
Implementing authority(ies)	Both NRA and NCPA enforce user protection provisions for postal services	
Users of private operators covered	Within US: Yes	Outside US: Yes
Publication of annual statistics	By USP: No	By NRA: Yes
User complaints to USP reviewed, 2012	Percent of complaints (%): ---	

C. Market facts

C.1 Market size and demand (2011)

Letter post items per capita (EU-27 average)	12 (164)
Share C2X (revenue/volume)	43% (Volume)
Share B2X (revenue/volume)	57% (Volume)
Parcel & express items per capita	20
Share C2X (revenue/volume)	14% (Volume)
Share B2X (revenue/volume)	86% (Volume)



	Volume	Main developments since 2007
Domestic and inbound cross-border letter post	85m	Average growth rate 2007-2011: -9.9%
Outbound cross-border letter post	3.51m	Average growth rate 2007-2011: -2.7% Note: (USP data)
Domestic parcel & express	n/a	
Outbound cross-border parcel & express	n/a	

C.2 Market structure and key market players

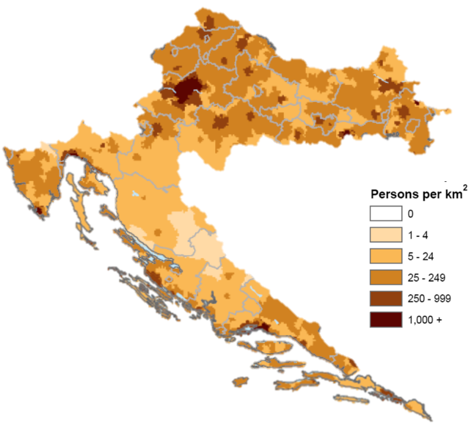
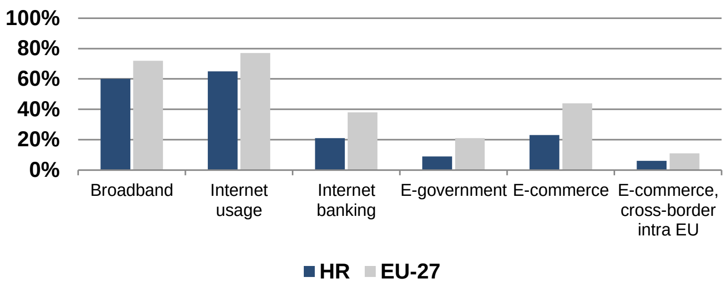
	TOP3 Market share	Perceived competition	Key players
Domestic letter post	99%	NRA: Marginal USP: n/a	BGUSP (95%)
Outbound cross-border letter post	98.1%	NRA: Marginal USP: n/a	BGUSP (96.6%)
Domestic parcel & express (total)	54%	NRA: Intense USP: n/a	Estimated USP market share: 5-10%
B2C	n/a	NRA: n/a USP: n/a	n/a
B2B	n/a	NRA: n/a USP: n/a	n/a
Outbound cross-border parcel & express	51%	NRA: n/a USP: n/a	DHL, In Time Courier, TNT Express

C.3 Bulgarian Posts (2010)

Legal status	plc	No segment information
State ownership	100%	
Total revenue	EUR 74m	
Share national revenue	n/a	
EBIT margin total / mail	0.1% / n/a	
Employment, total (headcount / FTE)	13,135 / n/a	
Share civil servants (headcount)	0%	
Share part-time	n/a	
Share wage costs on total costs	62.1%	

CROATIA

A. Country facts

Total population (2012)	4.1m	**Croatia** 
Population density (2012)	50 / sqkm	
Urbanisation rate (2011)	58%	
GDP growth rate (HR / EU-27)	2010: -1.4% 2011: 0.0% 2012: -1.9%	
GDP per capita in PPS (2011) (in % EU-27 average)	15,400 (60%)	
Transparency International CPI 2012 Score (Max. 100)	46	
ICT indicators (2012)		
Online purchase per capita	n.a.	Average growth rate (2007-2011): n.a.

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	Ministry of Sea, Tourism, Transport and Development
Ministry for ownership of PPO	---
National regulatory authority	Croatian Post and Electronic Communications Agency

B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 5	Appointed by: Parliament
NRA resources, 2012	Budget:	Professional staff: ---
NRA authority to levy fines	Yes	n/a
NRA authority to order remedies	Yes	
NRA right to data from USP	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	
NRA right to data from non-USPs	Compliance data: Universal service area only; Statistics: Yes for all postal services	

B.3 National Competition Autority			
National competition authority	Croatian Competition Agency		
Primary authority for competition rules	National competition authority (NCA)		
NRA/NCA cooperation	Share data: No	Regular consult: ---	Coord agmt: Yes
NCA decisions since 2009			
State aid cases			

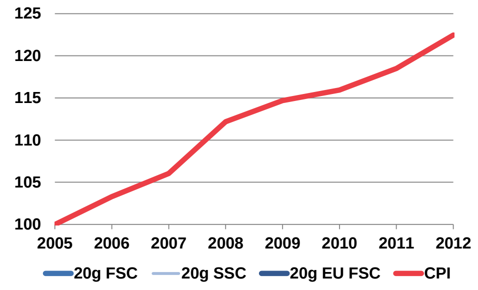
B.4 Scope of Universal Service			
Service	**Ensured**	**Price regulated**	**Service standards**
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	No	---	---
Bulk advertisements	No	---	---
Newspapers, magazines, etc.	No	---	---
Non-priority correspondence	Yes	Yes	Yes
Single piece parcels	Yes	Yes	Yes
Bulk parcels	No	---	---
Delivery frequency for LP	5 days per week		
Delivery frequency for parcels	5 days per week	Delivery point: Parcels must be delivered to addressee for appropriate charge to addressee	

B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: All cross-border services	Second agency: ---	
EU v. UPU law, intra-EU	---		
EU v. UPU law, extra-EU	---		
Enforcement of Art. 13	Cost based TDs: Unknown, no information	Related to QoS: Unknown, no information	Transparent: Unknown, no information
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	Unknown, no information		
NRA prohibits discrimination between inbound mail from different EU mailers?	---	TD regimes: ---	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	Unknown, no information	TD regimes: ---	
Overalll net gain/ loss due to TDs not aligned to domestic postage	No answer		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): ---	Volume (%) : ---	
Choice between market forces, designation, and procurement	Study: No	National USP appointed by legislation: ---	
Method of ensuring US	Mkt force (%): ---	Designation (%): 55	Procurement (%): ---
Households not receiving US	Letter post (% pop): 10	Parcels (% pop): ---	
Net cost of US0 in 2012	Pct USP exp: ---	Net cost study: No	
USO financed from public funds	No		
USO financed from compensation fund	Authorized: Yes	Established: No	

B.7 Universal service indicators

Price trend	2010	2013
20g FSC, domestic	EUR	EUR 0.61
20g SSC, domestic	EUR	EUR 0.41
20g FSC, EU	EUR	EUR
5kg parcel, domestic	EUR	EUR
5kg parcel, cross-border (lowest tariff)	EUR	EUR



Quality of service	2010	2012	USP customer satisfaction index
Domestic target (D+1)	85%		
Performance (D+1)		80% (2011)	
Postal outlets (total)	1,142	1,040	
Postal outlets per 10,000 inhabitants	2.58	2.36	
Share post offices	100%	100%	

B.8 Legal Treatment of Competitive Services

Special tariffs are transparent and non-discriminatory?	Bulk letters: ---	Direct mail: ---	Bulk parcels: ---
Special tariffs are available to other postal operators?	Bulk letters: ---	Direct mail: ---	Bulk parcels: ---
Licence required within US area	---		
Use of potentially restrictive authorisation conditions	Univ. servs: Yes	Quality conditions: No	Competence: Yes
Access to postal infrastructure by competitors	Addr. database: Unknown, no information	Post office boxes: ---	Delivery boxes: Unknown, no information
VAT: USP services exempt	---		
Customs: USP services subject to UPU customs rules	Inbound letters and large envelopes; inbound parcels (UPU inward land rates);		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: Unknown, no information	USP accepts inbound mail from EU/EEA ETOEs?: Unknown, no information	
Intra-EU remail restrictions	ABA remail: Unknown, no information	ABC remail: Unknown, no information	
Labour law: special rules in postal sector	No		

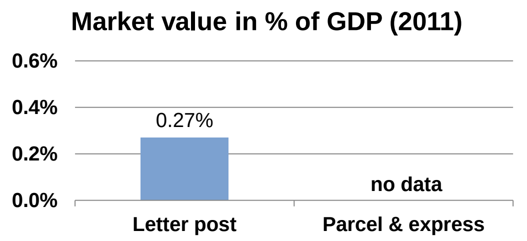
B.9 Protections of Users

Protection of users by law	Yes	Postal laws and/or regulations include user protection provisions.
Implementing authority(ies)	Postal NRA enforces user protection provisions for postal services	
Users of private operators covered	Within US: Yes	Outside US: Yes
Publication of annual statistics	By USP: Yes	By NRA: ---
User complaints to USP reviewed, 2012	Percent of complaints (%): ---	

C. Market facts

C.1 Market size and demand (2011)

Letter post items per capita (EU-27 average)	69 (164)
Share C2X (revenue/volume)	10% (Volume)
Share B2X (revenue/volume)	90% (Volume)
Parcel & express items per capita	2
Share C2X (revenue/volume)	5% (n/a)
Share B2X (revenue/volume)	95% (n/a)



	Volume	Main developments since 2007
Domestic and inbound cross-border letter post	303m	Average growth rate 2007-2011: n/a
Outbound cross-border letter post	7.24m	Average growth rate 2007-2011: -9.5% Note: (USP data)
Domestic parcel & express	9m	
Outbound cross-border parcel & express	n/a	

C.2 Market structure and key market players

	TOP3 Market share	Perceived competition	Key players
Domestic letter post	99%	NRA: Moderate USP: Intense	HRUSP (80%) City Ex Lider Expres
Outbound cross-border letter post	100%	NRA: Low USP: Low	n/a
Domestic parcel & express (total)	75%	NRA: Intense USP: Intense	Estimated USP market share: 15-20%
B2C	n/a	NRA: Intense USP: Intense	n/a
B2B	n/a	NRA: Intense USP: Intense	n/a
Outbound cross-border parcel & express	75%	NRA: Intense USP: Low	n/a

C.3 Hrvatska pošta (2011)

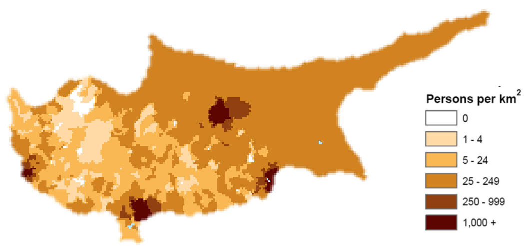
Legal status	State enterprise	No segment information
State ownership	100%	
Total revenue	EUR 219m	
Share national revenue	n/a	
EBIT margin total / mail	2.8% / n/a	
Employment, total (headcount / FTE)	10,664 / n/a	
Share civil servants (headcount)	0%	
Share part-time	n/a	
Share wage costs on total costs	69.1%	

CYPRUS

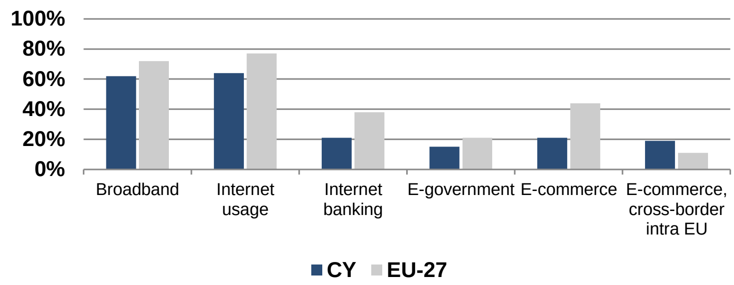
A. Country facts

Total population (2012)	0.9m
Population density (2012)	93 / sqkm
Urbanisation rate (2011)	71%
GDP growth rate (CY / EU-27)	2010: 1.3% 2011: 0.5% 2012: -2.4%
GDP per capita in PPS (2011) (in % EU-27 average)	23,700 (94%)
Transparency International CPI 2012 Score (Max. 100)	66

Cyprus



ICT indicators (2012)



Online purchase per capita	n.a.	Average growth rate (2007-2011): n.a.

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	Ministry of Communication and Works
Ministry for ownership of PPO	Ministry of Communication and Works
National regulatory authority	Office of the Commissioner for Electronic Communication and Postal Regulation

B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 1	Appointed by: Council of Ministers or Prime Minister
NRA resources, 2012	Budget: 474156	Professional staff: 3
NRA authority to levy fines	Yes	Limit: 171000
NRA authority to order remedies	Yes	
NRA right to data from USP	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	
NRA right to data from non-USPs	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	

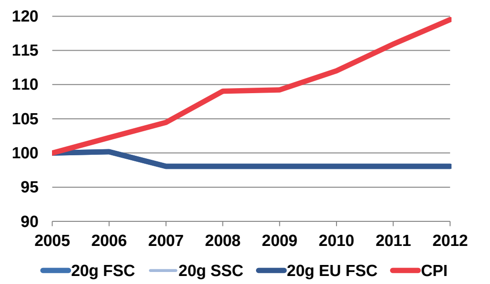
B.3 National Competition Autority			
National competition authority	Commission for the Protection of Competition		
Primary authority for competition rules	National competition authority (NCA)		
NRA/NCA cooperation	Share data: Yes	Regular consult: Yes	Coord agmt: No
NCA decisions since 2009			
State aid cases			

B.4 Scope of Universal Service			
Service	**Ensured**	**Price regulated**	**Service standards**
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	Yes	Yes	Yes
Bulk advertisements	Yes	No	No
Newspapers, magazines, etc.	Yes	No	No
Non-priority correspondence	No	No	No answer
Single piece parcels	Yes	Yes	No
Bulk parcels	Yes	No	No
Delivery frequency for LP	5 days per week		
Delivery frequency for parcels	No specific requirement	Delivery point: Parcels must be delivered without charge to addressee	

B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: No answer	Second agency: ---	
EU v. UPU law, intra-EU	NA		
EU v. UPU law, extra-EU	NA		
Enforcement of Art. 13	Cost based TDs: No answer	Related to QoS: No answer	Transparent: No answer
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	No answer		
NRA prohibits discrimination between inbound mail from different EU mailers?	---	TD regimes: ---	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	No answer	TD regimes: ---	
Overalll net gain/ loss due to TDs not aligned to domestic postage	No answer		

B.7 Universal service indicators

Price trend	2010	2013
20g FSC, domestic	EUR 0.34	EUR 0.34
20g SSC, domestic		
20g FSC, EU	EUR 0.51	EUR 0.51
5kg parcel, domestic	EUR 3.00	EUR 3.00
5kg parcel, cross-border (lowest tariff)	EUR 44.42	EUR 44.42



Quality of service	2010	2012	USP customer satisfaction index
Domestic target (D+1)	90%	90%	
Performance (D+1)	89.4%	90.9%	
Postal outlets (total)	1,101	1,086	
Postal outlets per 10,000 inhabitants	13.44	12.6	
Share post offices	5.1%	5.5%	

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): 0	Volume (%) : 90	
Choice between market forces, designation, and procurement	Study: No	National USP appointed by legislation: Yes	
Method of ensuring US	Mkt force (%): 0	Designation (%): ---	Procurement (%): ---
Households not receiving US	Letter post (% pop): ---	Parcels (% pop): ---	
Net cost of US0 in 2012	Pct USP exp: ---	Net cost study: No	
USO financed from public funds	No		
USO financed from compensation fund	Authorized: Yes	Established: Yes	

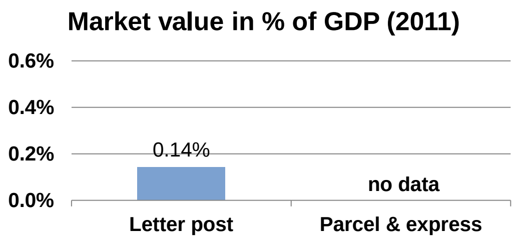
B.8 Legal Treatment of Competitive Services			
Special tariffs are transparent and non-discriminatory?	Bulk letters: Required by law and verified in practice	Direct mail: Not required by law but verified in practice	Bulk parcels: Required by law and verified in practice
Special tariffs are available to other postal operators?	Bulk letters: Not required by law or verified in practice	Direct mail: Not required by law or verified in practice	Bulk parcels: Not required by law or verified in practice
Licence required within US area	Licence required for provision of some services with the universal service area		
Use of potentially restrictive authorisation conditions	Univ. servs: No	Quality conditions: No	Competence: No
Access to postal infrastructure by competitors	Addr. database: Yes	Post office boxes: Yes	Delivery boxes: Yes
VAT: USP services exempt	Single piece letters; single piece parcels; direct mail; newspapers/periodicals; bulk parcels; express services; outbound letter post; outbound parcel post; outbound express;		
Customs: USP services subject to UPU customs rules	Inbound letters and large envelopes; inbound small packets; inbound parcels (UPU inward land rates); inbound parcels (non-UPU charges); inbound express mail items;		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: Unknown, no information	USP accepts inbound mail from EU/EEA ETOEs?: Unknown, no information	
Intra-EU remail restrictions	ABA remail: No	ABC remail: No	
Labour law: special rules in postal sector	Unknown, no information		

B.9 Protections of Users		
Protection of users by law	Yes	Both postal and consumer protection laws apply to postal users.
Implementing authority(ies)	Both NRA and NCPA enforce user protection provisions for postal services	
Users of private operators covered	Within US: Yes	Outside US: Yes
Publication of annual statistics	By USP: No	By NRA: Yes
User complaints to USP reviewed, 2012	Percent of complaints (%): 2	

C. Market facts

C.1 Market size and demand (2011)

Letter post items per capita (EU-27 average)	86 (164)
Share C2X (revenue/volume)	10% (Revenue)
Share B2X (revenue/volume)	90% (Revenue)
Parcel & express items per capita	n/a
Share C2X (revenue/volume)	n/a
Share B2X (revenue/volume)	n/a



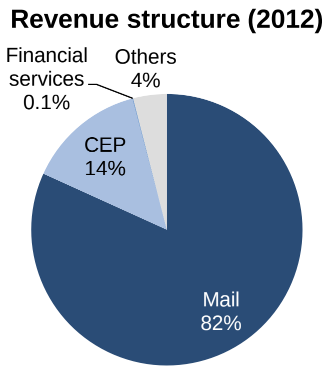
	Volume	Main developments since 2007
Domestic and inbound cross-border letter post	72m	Average growth rate 2007-2011: 6.0%
Outbound cross-border letter post	4.24m	Average growth rate 2007-2011: -19.1% Note: (USP data)
Domestic parcel & express	n/a	
Outbound cross-border parcel & express	n/a	

C.2 Market structure and key market players

	TOP3 Market share	Perceived competition	Key players
Domestic letter post	100%	NRA: n/a USP: Other	Cyprus Post
Outbound cross-border letter post	100%	NRA: n/a USP: Other	Cyprus Post
Domestic parcel & express (total)	n/a	NRA: Intense USP: Intense	Estimated USP market share: 0-5%
B2C	n/a	NRA: Intense USP: Intense	Akis express, ACS couriers, Travel & express
B2B	n/a	NRA: Intense USP: Intense	Akis express, ACS couriers, Travel & express
Outbound cross-border parcel & express	72%	NRA: Intense USP: Intense	DHL, EMS Datapost, FedEx, TNT Express

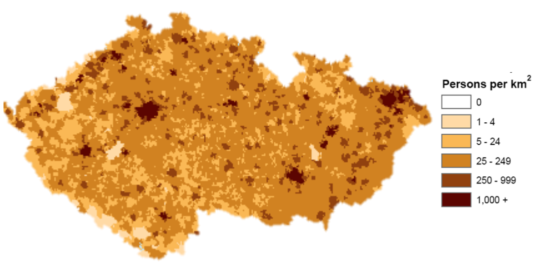
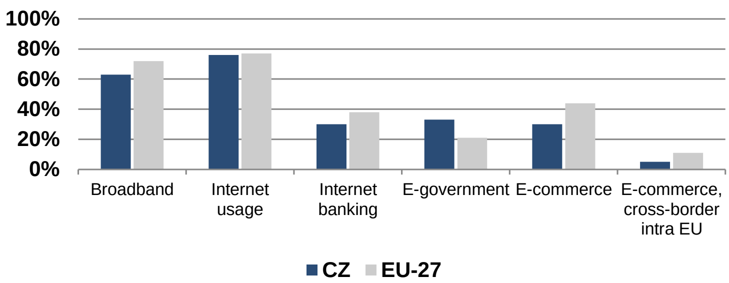
C.3 Cyprus Post (2012)

Legal status	Government department
State ownership	100%
Total revenue	EUR 31m
Share national revenue	100%
EBIT margin total / mail	11.8% / n/a
Employment, total (headcount / FTE)	685 /681
Share civil servants (headcount)	100%
Share part-time	0%
Share wage costs on total costs	73.9%



CZECH REPUBLIC

A. Country facts

Total population (2012)	10.5m	**Czech Republic** 
Population density (2012)	133 / sqkm	
Urbanisation rate (2011)	73%	
GDP growth rate (CZ / EU-27)	2010: 2.5% 2011: 1.9% 2012: -1.3%	
GDP per capita in PPS (2011) (in % EU-27 average)	20,200 (80%)	
Transparency International CPI 2012 Score (Max. 100)	49	
ICT indicators (2012)		
Online purchase per capita	EUR 153	Average growth rate (2007-2011): 36%

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	Ministry of Industry and Trade (MIT)
Ministry for ownership of PPO	Ministry of Interior
National regulatory authority	Czech Telecommunication Office

B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 5	Appointed by: Council of Ministers or Prime Minister
NRA resources, 2012	Budget: 217937	Professional staff: 7
NRA authority to levy fines	Yes	Limit: 398195,378544437
NRA authority to order remedies	No	
NRA right to data from USP	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	
NRA right to data from non-USPs	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	

B.3 National Competition Autority			
National competition authority	Office for the Protection of Competition		
Primary authority for competition rules	National competition authority (NCA)		
NRA/NCA cooperation	Share data: No	Regular consult: No	Coord agmt: ---
NCA decisions since 2009			
State aid cases			

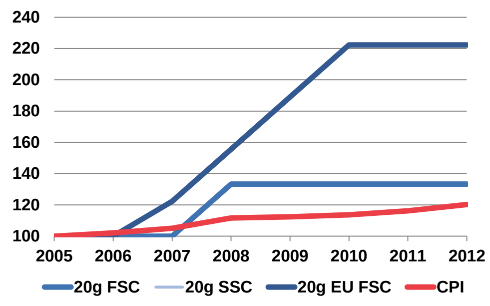
B.4 Scope of Universal Service			
Service	**Ensured**	**Price regulated**	**Service standards**
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	No	---	---
Bulk advertisements	No	---	---
Newspapers, magazines, etc.	No	---	---
Non-priority correspondence	No	---	---
Single piece parcels	Yes	Yes	No
Bulk parcels	No	---	---
Delivery frequency for LP	5 days per week		
Delivery frequency for parcels	5 days per week	Delivery point: Parcels must be delivered without charge to addressee	

B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: All cross-border services	Second agency: ---	
EU v. UPU law, intra-EU	EU law apply even if contrary to UPU provisions		
EU v. UPU law, extra-EU	EU law apply even if contrary to UPU provisions		
Enforcement of Art. 13	Cost based TDs: Yes	Related to QoS: Yes	Transparent: No
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	Yes		
NRA prohibits discrimination between inbound mail from different EU mailers?	2	TD regimes: Reims TDs; bilateral TD agreements;	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	Unknown, no information	TD regimes: 2008 UPU new target system;	
Overalll net gain/ loss due to TDs not aligned to domestic postage	No answer		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): 5	Volume (%) : 5	
Choice between market forces, designation, and procurement	Study: No	National USP appointed by legislation: Yes	
Method of ensuring US	Mkt force (%): 5	Designation (%): 100	Procurement (%): ---
Households not receiving US	Letter post (% pop): 0	Parcels (% pop): 0	
Net cost of US0 in 2012	Pct USP exp: ---	Net cost study: No	
USO financed from public funds	No		
USO financed from compensation fund	Authorized: Yes	Established: No	

B.7 Universal service indicators

Price trend	2010	2013
20g FSC, domestic	EUR 0.40	EUR 0.40
20g SSC, domestic		
20g FSC, EU	EUR 0.79	EUR 0.79
5kg parcel, domestic	EUR 1.98	EUR 2.34
5kg parcel, cross-border (lowest tariff)	EUR 8.90	EUR 8.92



Quality of service	2010	2012	USP customer satisfaction index
Domestic target (D+1)	92.5%	95%	
Performance (D+1)	93.2%	93.1%	
Postal outlets (total)	3,400	3,403	
Postal outlets per 10,000 inhabitants	3.24	3.24	
Share post offices	98.4%	97.1%	

B.8 Legal Treatment of Competitive Services

Special tariffs are transparent and non-discriminatory?	Bulk letters: ---	Direct mail: ---	Bulk parcels: ---
Special tariffs are available to other postal operators?	Bulk letters: ---	Direct mail: ---	Bulk parcels: ---
Licence required within US area	No authorisation required for provision of services with the universal service area		
Use of potentially restrictive authorisation conditions	Univ. servs: No	Quality conditions: No	Competence: No
Access to postal infrastructure by competitors	Addr. database: Yes	Post office boxes: Yes	Delivery boxes: No
VAT: USP services exempt	Single piece letters; single piece parcels; outbound letter post; outbound parcel post; other;		
Customs: USP services subject to UPU customs rules	inbound small packets; inbound parcels (UPU inward land rates); inbound parcels (non-UPU charges); inbound express mail items;		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: No	USP accepts inbound mail from EU/EEA ETOEs?: No	
Intra-EU remail restrictions	ABA remail: Yes	ABC remail: Yes	
Labour law: special rules in postal sector	No		

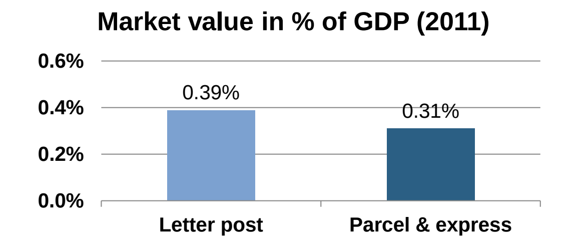
B.9 Protections of Users

Protection of users by law	Yes	Both postal and consumer protection laws apply to postal users.
Implementing authority(ies)	Postal NRA enforces user protection provisions for postal services	
Users of private operators covered	Within US: Yes	Outside US: Yes
Publication of annual statistics	By USP: Yes	By NRA: ---
User complaints to USP reviewed, 2012	Percent of complaints (%): ---	

C. Market facts

C.1 Market size and demand (2011)

Letter post items per capita (EU-27 average)	79 (164)
Share C2X (revenue/volume)	15% (Volume)
Share B2X (revenue/volume)	85% (Volume)
Parcel & express items per capita	3
Share C2X (revenue/volume)	28% (Volume)
Share B2X (revenue/volume)	72% (Volume)



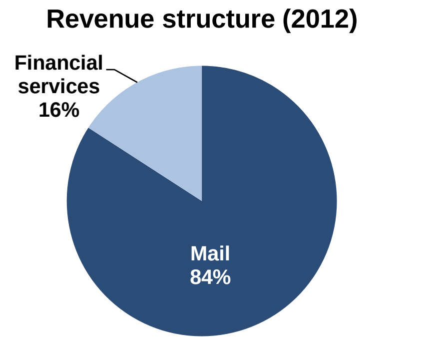
	Volume	Main developments since 2007
Domestic and inbound cross-border letter post	826m	Average growth rate 2007-2011: -2.8%
Outbound cross-border letter post	30.91m	Average growth rate 2007-2011: -9.7% Note: (USP data)
Domestic parcel & express	31.79m	
Outbound cross-border parcel & express	n/a	

C.2 Market structure and key market players

	TOP3 Market share	Perceived competition	Key players
Domestic letter post	94%	NRA: Moderate USP: Substantial	CZUSP (87%) Mediaservis Ceská distribucní
Outbound cross-border letter post	n/a	NRA: Moderate USP: Moderate	DHL FedEx
Domestic parcel & express (total)	n/a	NRA: Intense USP: Intense	Estimated USP market share: 25-30%
B2C	n/a	NRA: Substantial USP: n/a	Ceska Posta, DPD CZ, Geis Parcel CZ. PPL CZ (DHL)
B2B	n/a	NRA: Substantial USP: n/a	DPD CZ, Geis Parcel CZ, PPL CZ (DHL)
Outbound cross-border parcel & express	n/a	NRA: Moderate USP: Moderate	DHL, FedEx

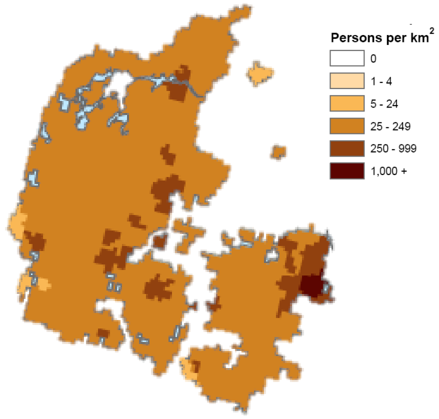
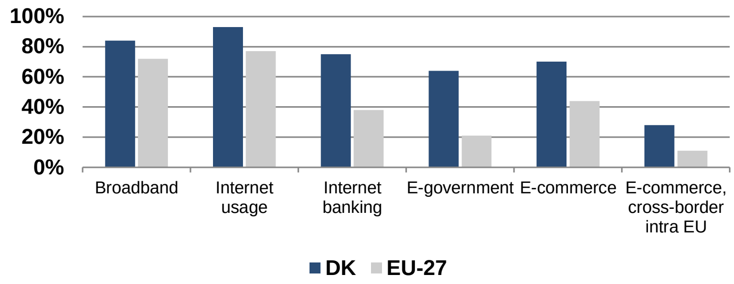
C.3 Česká pošta (2012)

Legal status	State enterprise
State ownership	100%
Total revenue	EUR 798m
Share national revenue	100%
EBIT margin total / mail	1% / n/a
Employment, total (headcount / FTE)	33,075 / 32,049
Share civil servants (headcount)	10.1%
Share part-time	n/a
Share wage costs on total costs	62.4% (2011)



DENMARK

A. Country facts

Total population (2012)	5.6m	**Denmark** 
Population density (2012)	130 / sqkm	
Urbanisation rate (2011)	87%	
GDP growth rate (DK/ EU-27)	2010: 1.6% 2011: 1.1% 2012: -0.6%	
GDP per capita in PPS (2011) (in % EU-27 average)	31,500 (125%)	
Transparency International CPI 2012 Score (Max. 100)	90	
ICT indicators (2012)		
Online purchase per capita	EUR 1,159	Average growth rate (2007-2011): 21%

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	Ministry of Transport
Ministry for ownership of PPO	---
National regulatory authority	Danish Transport Authority

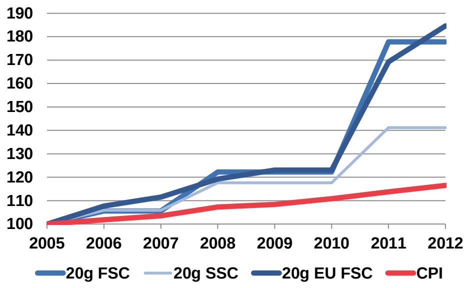
B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 1	Appointed by: Postal Minister or ministry staff
NRA resources, 2012	Budget: 403047	Professional staff: 1.5
NRA authority to levy fines	No	n/a
NRA authority to order remedies	Yes	
NRA right to data from USP	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	
NRA right to data from non-USPs	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	

B.3 National Competition Autority			
National competition authority	Danish Competition and Consumer Authority		
Primary authority for competition rules	National competition authority (NCA)		
NRA/NCA cooperation	Share data: Yes	Regular consult: No	Coord agmt: No
NCA decisions since 2009	▪ MCD-Mediabroker-Carat-IUM ▪ Post Danmark ▪ Bring City Mail/ Post Danmark ▪ Forbruger Kontakt/ Post Danmark		
State aid cases			

B.4 Scope of Universal Service			
Service	**Ensured**	**Price regulated**	**Service standards**
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	Yes	---	---
Bulk advertisements	Yes	Yes	Yes
Newspapers, magazines, etc.	Yes	No	No
Non-priority correspondence	Yes	Yes	Yes
Single piece parcels	Yes	Yes	Yes
Bulk parcels	Yes	Yes	Yes
Delivery frequency for LP	6 days per week		
Delivery frequency for parcels	5 days per week	Delivery point: Parcels must be delivered without charge to addressee	

B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: All cross-border services	Second agency: ---	
EU v. UPU law, intra-EU	NA		
EU v. UPU law, extra-EU	NA		
Enforcement of Art. 13	Cost based TDs: Yes	Related to QoS: Yes	Transparent: No
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	Unknown, no information		
NRA prohibits discrimination between inbound mail from different EU mailers?	---	TD regimes: 2008 UPU old target system; 2008 UPU transitional system; Reims TDs; bilateral TD agreements;	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	Unknown, no information	TD regimes: 2008 UPU old target system; 2008 UPU new target system; 2008 UPU transitional system; Reims TDs;	
Overalll net gain/ loss due to TDs not aligned to domestic postage	---		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): ---	Volume (%) : ---	
Choice between market forces, designation, and procurement	Study: No	National USP appointed by legislation: Yes	
Method of ensuring US	Mkt force (%): ---	Designation (%): ---	Procurement (%): ---
Households not receiving US	Letter post (% pop): 0.01	Parcels (% pop): 0.05	
Net cost of US0 in 2012	Pct USP exp: ---	Net cost study: No	
USO financed from public funds	No		
USO financed from compensation fund	Authorized: Yes	Established: No	

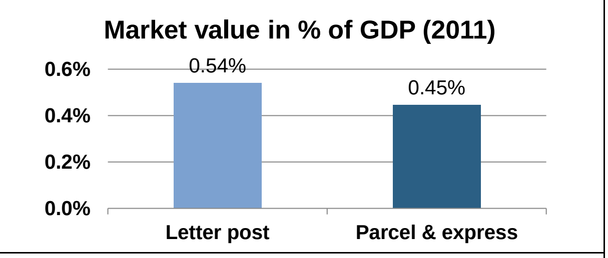
B.7 Universal service indicators			
Price trend	**2010**	**2013**	
20g FSC, domestic	EUR 0.74	EUR 1.07	
20g SSC, domestic	EUR 0.67	EUR 0.80	
20g FSC, EU	EUR 1.07	EUR 1.68	
5kg parcel, domestic		EUR 9.38	
5kg parcel, cross-border (lowest tariff)		EUR 37.53	
Quality of service	**2010**	**2012**	**USP customer satisfaction index**
Domestic target (D+1)	93%	93%	2010: 70% 2011: 70% 2012: 71%
Performance (D+1)	93.3%	93.5%	
Postal outlets (total)	723	694	
Postal outlets per 10,000 inhabitants	1.31	1.24	
Share post offices	13.3%	10.4%	

B.8 Legal Treatment of Competitive Services			
Special tariffs are transparent and non-discriminatory?	Bulk letters: Required by law but not verified in practice	Direct mail: Required by law but not verified in practice	Bulk parcels: Required by law but not verified in practice
Special tariffs are available to other postal operators?	Bulk letters: Required by law but not verified in practice	Direct mail: Required by law but not verified in practice	Bulk parcels: Required by law but not verified in practice
Licence required within US area	General authorisation required for provision of some services with the universal service area		
Use of potentially restrictive authorisation conditions	Univ. servs: No	Quality conditions: No	Competence: No
Access to postal infrastructure by competitors	Addr. database: Yes	Post office boxes: Yes	Delivery boxes: Yes
VAT: USP services exempt	Single piece letters; single piece parcels; direct mail; newspapers/periodicals; outbound letter post; outbound parcel post;		
Customs: USP services subject to UPU customs rules	Inbound letters and large envelopes; inbound small packets; inbound parcels (UPU inward land rates);		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: No	USP accepts inbound mail from EU/EEA ETOEs?: No	
Intra-EU remail restrictions	ABA remail: No answer	ABC remail: No answer	
Labour law: special rules in postal sector	No		

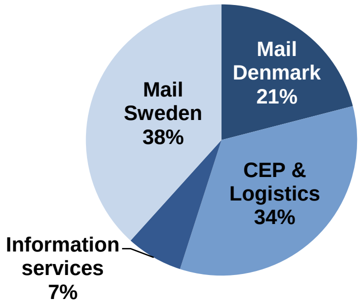
B.9 Protections of Users		
Protection of users by law	No	---
Implementing authority(ies)	Both NRA and NCPA enforce user protection provisions for postal services	
Users of private operators covered	Within US: Yes	Outside US: Yes
Publication of annual statistics	By USP: Yes	By NRA: No
User complaints to USP reviewed, 2012	Percent of complaints (%): ---	

C. Market facts

C.1 Market size and demand (2011)		
Letter post items per capita (EU-27 average)	159 (164)	
Share C2X (revenue/volume)	n/a	
Share B2X (revenue/volume)	n/a	
Parcel & express items per capita	n/a	
Share C2X (revenue/volume)	n/a	
Share B2X (revenue/volume)	n/a	
	Volume	**Main developments since 2007**
Domestic and inbound cross-border letter post	885m	Average growth rate 2007-2011: -10.3%
Outbound cross-border letter post	n/a	n/a Note: (USP data)
Domestic parcel & express	n/a	
Outbound cross-border parcel & express	n/a	

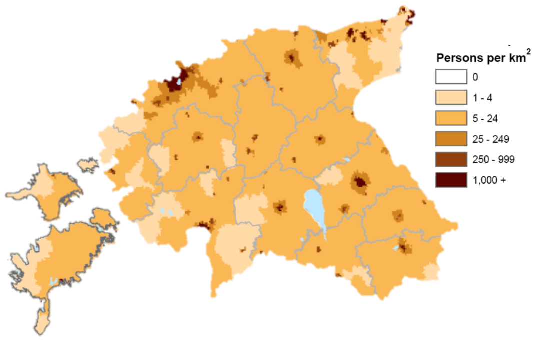
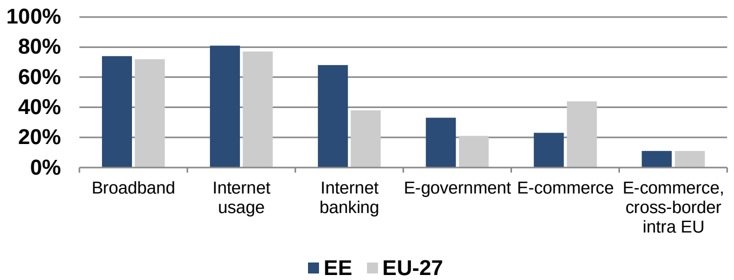


C.2 Market structure and key market players			
	TOP3 Market share	**Perceived competition**	**Key players**
Domestic letter post	100%	NRA: Low USP: Other	Post Danmark A/S
Outbound cross-border letter post	n/a	NRA: Low USP: Substantial	Post Danmark A/S
Domestic parcel & express (total)	n/a	NRA: Substantial USP: Other	Estimated USP market share: >30%
B2C	n/a	NRA: Substantial USP: Intense	Post Danmark, DHL, GLS
B2B	n/a	NRA: n/a USP: Intense	PostNord, Bring, GLS Denmark
Outbound cross-border parcel & express	n/a	NRA: n/a USP: Intense	DHL, GLS, PostNord

C.3 Post Danmark (2012)		
Legal status	plc	Revenue structure (2012) 
State ownership	40% Subsidiary of PostNord AB (60% owned by Swedish state)	
Total revenue	EUR 4,471m	
Share national revenue	n/a	
EBIT margin total / mail	0.9% / -0.2%	
Employment, total (headcount / FTE)	39,713 / n/a	
Share civil servants (headcount)	n/a	
Share part-time	n/a	
Share wage costs on total costs	47.6%	

ESTONIA

A. Country facts

Total population (2012)	1.3m	**Estonia** 
Population density (2012)	30 / sqkm	
Urbanisation rate (2011)	70%	
GDP growth rate (EE / EU-27)	2010: 3.3% 2011: 8.3% 2012: 3.2%	
GDP per capita in PPS (2011) (in % EU-27 average)	16,900 (67%)	
Transparency International CPI 2012 Score (Max. 100)	64	
ICT indicators (2012)		
Online purchase per capita	n.a.	Average growth rate (2007-2011): n.a.

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	Ministry of Economic Affairs and Communications
Ministry for ownership of PPO	---
National regulatory authority	Estonian Competition Authority

B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 1	Appointed by: Postal Minister or ministry staff
NRA resources, 2012	Budget:	Professional staff: 3
NRA authority to levy fines	Yes	Limit: 3200
NRA authority to order remedies	Yes	
NRA right to data from USP	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	
NRA right to data from non-USPs	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	

B.3 National Competition Autority			
National competition authority	Estonian Competition Authority		
Primary authority for competition rules	National regulatory authority for postal affairs (NRA)		
NRA/NCA cooperation	Share data: Yes	Regular consult: No	Coord agmt: ---
NCA decisions since 2009			
State aid cases			

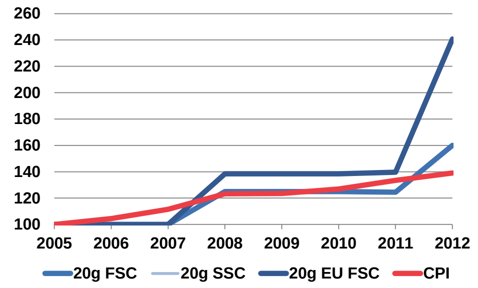
B.4 Scope of Universal Service			
Service	**Ensured**	**Price regulated**	**Service standards**
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	No	---	---
Bulk advertisements	No	No	No
Newspapers, magazines, etc.	No	---	---
Non-priority correspondence	No	---	---
Single piece parcels	Yes	Yes	No
Bulk parcels	No	No	No
Delivery frequency for LP	5 days per week		
Delivery frequency for parcels	5 days per week	Delivery point: Parcels required only to be held at postal outlet nearest addressee	

B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: All cross-border services	Second agency: ---	
EU v. UPU law, intra-EU	UPU provisions apply even if contrary to EU law		
EU v. UPU law, extra-EU	UPU provisions apply even if contrary to EU law		
Enforcement of Art. 13	Cost based TDs: Yes	Related to QoS: Yes	Transparent: No
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	Yes		
NRA prohibits discrimination between inbound mail from different EU mailers?	---	TD regimes: Reims TDs; bilateral TD agreements;	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	Unknown, no information	TD regimes: 2008 UPU new target system; 2008 UPU transitional system;	
Overalll net gain/ loss due to TDs not aligned to domestic postage	No answer		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): ---	Volume (%) : ---	
Choice between market forces, designation, and procurement	Study: No	National USP appointed by legislation: Yes	
Method of ensuring US	Mkt force (%): 0	Designation (%): 100	Procurement (%): 0
Households not receiving US	Letter post (% pop): 0	Parcels (% pop): 0	
Net cost of US0 in 2012	Pct USP exp: 30	Net cost study: Yes	
USO financed from public funds	No		
USO financed from compensation fund	Authorized: Yes	Established: Yes	

B.7 Universal service indicators

Price trend	2010	2013
20g FSC, domestic	EUR 0.35	EUR 0.45
20g SSC, domestic		
20g FSC, EU		EUR 1.00
5kg parcel, domestic		EUR 3.83
5kg parcel, cross-border (lowest tariff)		



Quality of service	2010	2012	USP customer satisfaction index
Domestic target (D+1)	90%	90%	
Performance (D+1)	92.7%	91.1%	
Postal outlets (total)	385	363 (2011)	
Postal outlets per 10,000 inhabitants	2.87	2.71 (2011)	
Share post offices	13%	12.9% (2011)	

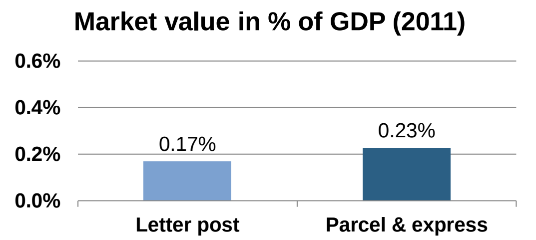
B.8 Legal Treatment of Competitive Services

Special tariffs are transparent and non-discriminatory?	Bulk letters: Required by law and verified in practice	Direct mail: Not required by law or verified in practice	Bulk parcels: Required by law and verified in practice
Special tariffs are available to other postal operators?	Bulk letters: Required by law and verified in practice	Direct mail: Not required by law or verified in practice	Bulk parcels: Required by law and verified in practice
Licence required within US area	Licence required for provision of some services with the universal service area		
Use of potentially restrictive authorisation conditions	Univ. servs: No	Quality conditions: No	Competence: Yes
Access to postal infrastructure by competitors	Addr. database: No	Post office boxes: Yes	Delivery boxes: No
VAT: USP services exempt	Single piece letters; single piece parcels; outbound letter post; outbound parcel post;		
Customs: USP services subject to UPU customs rules	Inbound letters and large envelopes; inbound parcels (UPU inward land rates);		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: No	USP accepts inbound mail from EU/EEA ETOEs?: No	
Intra-EU remail restrictions	ABA remail: Unknown, no information	ABC remail: Unknown, no information	
Labour law: special rules in postal sector	No		

B.9 Protections of Users

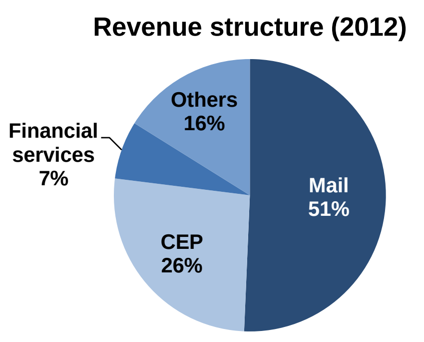
Protection of users by law	Yes	Both postal and consumer protection laws apply to postal users.
Implementing authority(ies)	Both NRA and NCPA enforce user protection provisions for postal services	
Users of private operators covered	Within US: Yes	Outside US: Yes
Publication of annual statistics	By USP: Yes	By NRA: ---
User complaints to USP reviewed, 2012	Percent of complaints (%): 25	

C. Market facts

C.1 Market size and demand (2011)		
Letter post items per capita (EU-27 average)	56 (164)	
Share C2X (revenue/volume)	24% (Volume)	
Share B2X (revenue/volume)	76% (Volume)	
Parcel & express items per capita	4	
Share C2X (revenue/volume)	n/a	
Share B2X (revenue/volume)	n/a	

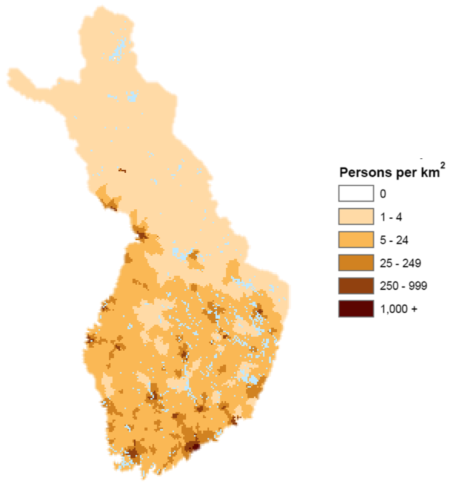
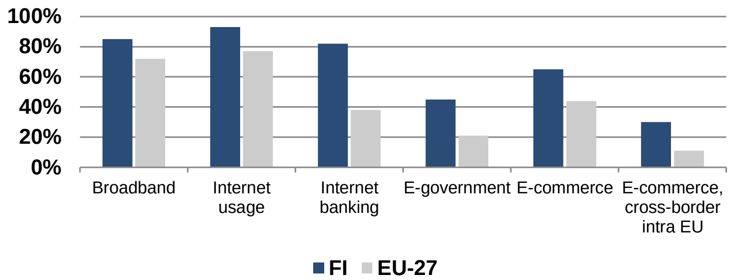
	Volume	Main developments since 2007
Domestic and inbound cross-border letter post	75m	Average growth rate 2007-2011: -11.3%
Outbound cross-border letter post	2.78m	Average growth rate 2007-2011: -4.6% Note: (USP data)
Domestic parcel & express	4.75m	
Outbound cross-border parcel & express	n/a	

C.2 Market structure and key market players			
	TOP3 Market share	**Perceived competition**	**Key players**
Domestic letter post	100%	NRA: Moderate USP: Substantial	Eesti Post Ltd. (96%) Express Post Ltd.
Outbound cross-border letter post	100%	NRA: Low USP: Marginal	Eesti Post Ltd.
Domestic parcel & express (total)	80%	NRA: Substantial USP: Substantial	Estimated USP market share: 30-35%
B2C	n/a	NRA: n/a USP: Substantial	Eesti Post Ltd., DPD Eesti
B2B	n/a	NRA: n/a USP: Moderate	Eesti Post Ltd., DPD Eesti, G4S Eesti
Outbound cross-border parcel & express	75%	NRA: Moderate USP: Low	DHL Estonia Ltd., DPD Eesti Ltd., Eesti Post Ltd., TNT Express

C.3 Eesti Post (2012)		
Legal status	plc	
State ownership	100%	
Total revenue	EUR 53m	
Share national revenue	77%	
EBIT margin total / mail	4.4% / n/a	
Employment, total (headcount / FTE)	32,110 / 27,973	
Share civil servants (headcount)	0%	
Share part-time	n/a	
Share wage costs on total costs	44.7%	

FINLAND

A. Country facts

Total population (2012)	5.4m	**Finland** 
Population density (2012)	16 / sqkm	
Urbanisation rate (2011)	84%	
GDP growth rate (FI / EU-27)	2010: 3.3% 2011: 2.8% 2012: -0.2%	
GDP per capita in PPS (2011) (in % EU-27 average)	28,800 (115%)	
Transparency International CPI 2012 Score (Max. 100)	90	
ICT indicators (2012)		
Online purchase per capita	EUR 838	Average growth rate (2007-2011): 15%

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	Ministry of Transport and Communications
Ministry for ownership of PPO	Prime Minister's Office, Ownership Steering Department
National regulatory authority	Finnish Communications Regulatory Authority

B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 1	Appointed by: Council of Ministers or Prime Minister
NRA resources, 2012	Budget: 975000	Professional staff: ---
NRA authority to levy fines	Yes	n/a
NRA authority to order remedies	Yes	
NRA right to data from USP	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	
NRA right to data from non-USPs	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	

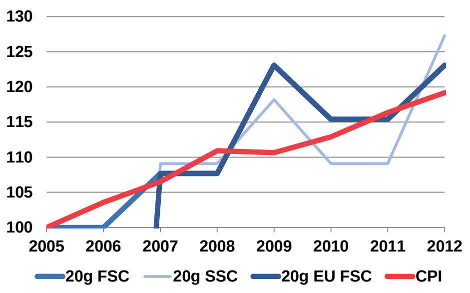
B.3 National Competition Autority			
National competition authority	Finnish Competition and Consumer Authority		
Primary authority for competition rules	National competition authority (NCA)		
NRA/NCA cooperation	Share data: No	Regular consult: No	Coord agmt: No
NCA decisions since 2009			
State aid cases			

B.4 Scope of Universal Service			
Service	**Ensured**	**Price regulated**	**Service standards**
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	No	No	No
Bulk advertisements	No	No	No
Newspapers, magazines, etc.	No	No	No
Non-priority correspondence	Yes	Yes	Yes
Single piece parcels	Yes	Yes	No
Bulk parcels	No	No	No
Delivery frequency for LP	5 days per week		
Delivery frequency for parcels	5 days per week	Delivery point: Parcels required only to be held at postal outlet nearest addressee	

B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: All cross-border services	Second agency: ---	
EU v. UPU law, intra-EU	Other		
EU v. UPU law, extra-EU	Other		
Enforcement of Art. 13	Cost based TDs: Unknown, no information	Related to QoS: Unknown, no information	Transparent: Unknown, no information
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	Unknown, no information		
NRA prohibits discrimination between inbound mail from different EU mailers?	---	TD regimes: ---	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	Unknown, no information	TD regimes: ---	
Overalll net gain/ loss due to TDs not aligned to domestic postage	No answer		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): ---	Volume (%) : ---	
Choice between market forces, designation, and procurement	Study: No	National USP appointed by legislation: Yes	
Method of ensuring US	Mkt force (%): ---	Designation (%): 100	Procurement (%): ---
Households not receiving US	Letter post (% pop): ---	Parcels (% pop): ---	
Net cost of US0 in 2012	Pct USP exp: ---	Net cost study: No	
USO financed from public funds	No		
USO financed from compensation fund	Authorized: No	Established: No	

B.7 Universal service indicators

Price trend	2010	2013	
20g FSC, domestic	EUR 0.75	EUR 0.80	
20g SSC, domestic	EUR 0.60	EUR 0.70	
20g FSC, EU	EUR 0.75	EUR 0.80	
5kg parcel, domestic	EUR 10.05	EUR 8.50	
5kg parcel, cross-border (lowest tariff)		EUR 21.00	
Quality of service	**2010**	**2012**	**USP customer satisfaction index**
Domestic target (D+1)	85%	80%	2011: 2.81 of 5 2012: 3.11 of 5
Performance (D+1)	91.1%	90.4%	
Postal outlets (total)	1,060	1,099	
Postal outlets per 10,000 inhabitants	1.98	2.03	
Share post offices	13.2%	9.3%	

B.8 Legal Treatment of Competitive Services

Special tariffs are transparent and non-discriminatory?	Bulk letters: ---	Direct mail: ---	Bulk parcels: ---
Special tariffs are available to other postal operators?	Bulk letters: ---	Direct mail: ---	Bulk parcels: ---
Licence required within US area	Licence required for provision of some services with the universal service area		
Use of potentially restrictive authorisation conditions	Univ. servs: Yes	Quality conditions: Yes	Competence: No
Access to postal infrastructure by competitors	Addr. database: No	Post office boxes: No	Delivery boxes: No
VAT: USP services exempt	Single piece letters; single piece parcels; outbound letter post; outbound parcel post;		
Customs: USP services subject to UPU customs rules	---		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: No	USP accepts inbound mail from EU/EEA ETOEs?: ---	
Intra-EU remail restrictions	ABA remail: ---	ABC remail: ---	
Labour law: special rules in postal sector	No		

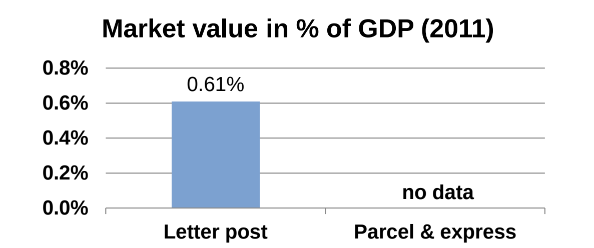
B.9 Protections of Users

Protection of users by law	Yes	Both postal and consumer protection laws apply to postal users.
Implementing authority(ies)	NCPA enforces user protection provisions for postal services	
Users of private operators covered	Within US: Yes	Outside US: Yes
Publication of annual statistics	By USP: No	By NRA: No
User complaints to USP reviewed, 2012	Percent of complaints (%): 305	

C. Market facts

C.1 Market size and demand (2011)

Letter post items per capita (EU-27 average)	290 (164)
Share C2X (revenue/volume)	5% (Volume)
Share B2X (revenue/volume)	95% (Volume)
Parcel & express items per capita	8
Share C2X (revenue/volume)	n/a
Share B2X (revenue/volume)	n/a



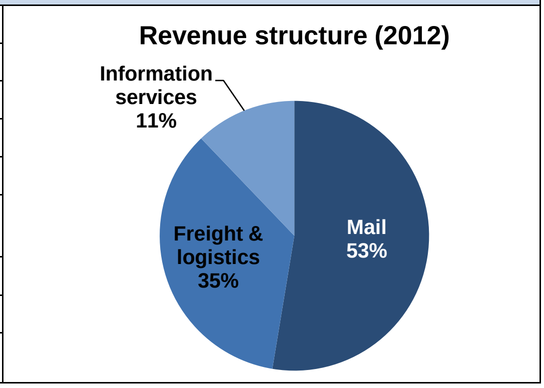
	Volume	**Main developments since 2007**
Domestic and inbound cross-border letter post	1,560m	Average growth rate 2007-2011: -1.2%
Outbound cross-border letter post	17m	Average growth rate 2007-2011: -10% Note: (Market survey NRA)
Domestic parcel & express	43.2m	Note: (NRA market survey 2010)
Outbound cross-border parcel & express	n/a	

C.2 Market structure and key market players

	TOP3 Market share	**Perceived competition**	**Key players**
Domestic letter post	100%	NRA: Marginal USP: Marginal	Itella Posti Oy (100%) Esa Jakelut Ilves Jakelut
Outbound cross-border letter post	n/a	NRA: Marginal USP: Low	Itella Posti Oy Posten (ETOE)
Domestic parcel & express (total)	n/a	NRA: Substantial USP: Intense	Estimated USP market share: >30%
B2C	n/a	NRA: n/a USP: Intense	Itella / Posti
B2B	n/a	NRA: Substantial USP: Intense	Itella, Matkahuolto, Schenker
Outbound cross-border parcel & express	n/a	NRA: n/a USP: Substantial	DHL, DPD, UPS

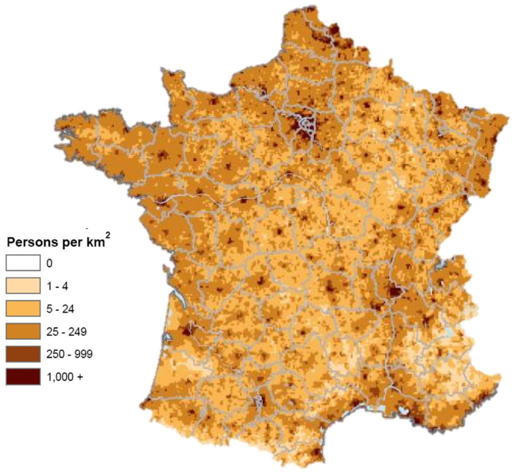
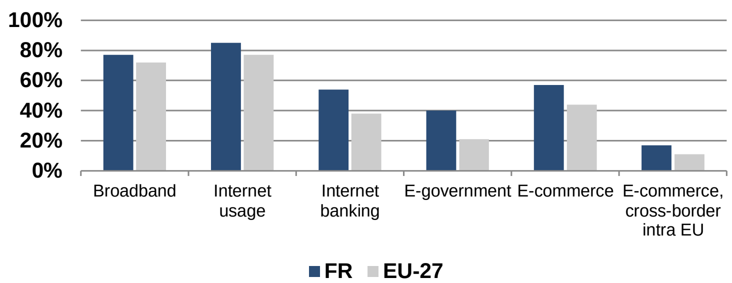
C.3 Itella (2012)

Legal status	plc
State ownership	100%
Total revenue	EUR 1,947m
Share national revenue	n/a
EBIT margin total / mail	2.0% / 6.3%
Employment, total (headcount / FTE)	n/a / 58,952
Share civil servants (headcount)	0%
Share part-time	n/a
Share wage costs on total costs	48%



FRANCE

A. Country facts

Total population (2012)	65.3m	
Population density (2012)	103 / sqkm	
Urbanisation rate (2011)	86%	
GDP growth rate (FR / EU-27)	2010: 1.7% 2011: 1.7% 2012: 0.0%	
GDP per capita in PPS (2011) (in % EU-27 average)	27,200 (108%)	
Transparency International CPI 2012 Score (Max. 100)	71	
ICT indicators (2012)		
Online purchase per capita	EUR 580	Average growth rate (2007-2011): 24%

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	Ministère du Redressement Productif. Fleur Pellerin, Ministre auprès du Ministre du Redressement Productif, chargée des PME, de l'innovation et de l'économie numérique (Ministre chargé des postes).
Ministry for ownership of PPO	Agence des Participations de l'Etat
National regulatory authority	Regulation Authority for Electronic Communications and Posts

B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 7	Appointed by: Other
NRA resources, 2012	Budget:	Professional staff: ---
NRA authority to levy fines	Yes	n/a
NRA authority to order remedies	Yes	
NRA right to data from USP	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	
NRA right to data from non-USPs	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	

B.3 National Competition Autority			
National competition authority	Competition Authority		
Primary authority for competition rules	National competition authority (NCA)		
NRA/NCA cooperation	Share data: Yes	Regular consult: Yes	Coord agmt: No
NCA decisions since 2009	11-MC-01 - *Kiala/La Poste et Mondial Relay*		
State aid cases	▪ C56/2007 - Garantie d'Etat illimitée - La Poste (F) ▪ SA.34027 - Abattement fiscal en faveur de LA POSTE pour le financement de la présence territoriale		

B.4 Scope of Universal Service			
Service	**Ensured**	**Price regulated**	**Service standards**
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	Yes	Yes	No
Bulk advertisements	Yes	Yes	No
Newspapers, magazines, etc.	Yes	Yes	Yes
Non-priority correspondence	Yes	Yes	Yes
Single piece parcels	Yes	Yes	Yes
Bulk parcels	No	No	No
Delivery frequency for LP	6 days per week		
Delivery frequency for parcels	6 days per week	Delivery point: Other	

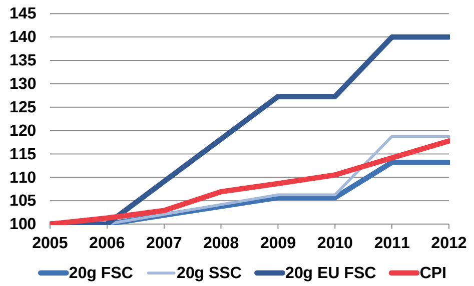
B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: All cross-border services	Second agency: ---	
EU v. UPU law, intra-EU	---		
EU v. UPU law, extra-EU	---		
Enforcement of Art. 13	Cost based TDs: ---	Related to QoS: ---	Transparent: ---
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	---		
NRA prohibits discrimination between inbound mail from different EU mailers?	---	TD regimes: ---	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	---	TD regimes: ---	
Overalll net gain/ loss due to TDs not aligned to domestic postage	---		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): ---	Volume (%) : ---	
Choice between market forces, designation, and procurement	Study: ---	National USP appointed by legislation: Yes	
Method of ensuring US	Mkt force (%): ---	Designation (%): 0	Procurement (%): ---
Households not receiving US	Letter post (% pop): ---	Parcels (% pop): ---	
Net cost of US0 in 2012	Pct USP exp: ---	Net cost study: No	
USO financed from public funds	No		
USO financed from compensation fund	Authorized: Yes	Established: No	

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B.7 Universal service indicators

Price trend	2010	2013
20g FSC, domestic	EUR 0.56	EUR 0.63
20g SSC, domestic	EUR 0.51	EUR 0.58
20g FSC, EU	EUR 0.70	EUR 0.80
5kg parcel, domestic	EUR 10.07	EUR 11.31
5kg parcel, cross-border (lowest tariff)	EUR 27.17	EUR 27.50



Quality of service	2010	2012	USP customer satisfaction index
Domestic target (D+1)	85%	85%	2012: 77%
Performance (D+1)	83.4%	87.9%	
Postal outlets (total)	17,079	17,041	
Postal outlets per 10,000 inhabitants	2.64	2.61	
Share post offices	59.8%	57.6%	

B.8 Legal Treatment of Competitive Services

Special tariffs are transparent and non-discriminatory?	Bulk letters: Required by law and verified in practice	Direct mail: Required by law and verified in practice	Bulk parcels: No answer
Special tariffs are available to other postal operators?	Bulk letters: Required by law and verified in practice	Direct mail: Required by law and verified in practice	Bulk parcels: No answer
Licence required within US area	Licence required for provision of some services with the universal service area		
Use of potentially restrictive authorisation conditions	Univ. servs: No	Quality conditions: No	Competence: Yes
Access to postal infrastructure by competitors	Addr. database: Yes	Post office boxes: Yes	Delivery boxes: Yes
VAT: USP services exempt	outbound parcel post;		
Customs: USP services subject to UPU customs rules	---		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: No	USP accepts inbound mail from EU/EEA ETOEs?: ---	
Intra-EU remail restrictions	ABA remail: ---	ABC remail: ---	
Labour law: special rules in postal sector	No		

B.9 Protections of Users

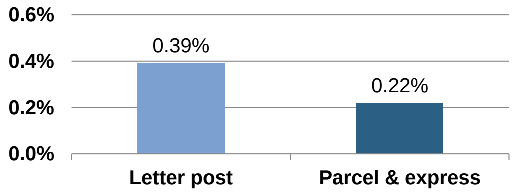
Protection of users by law	Yes	Both postal and consumer protection laws apply to postal users.
Implementing authority(ies)	Both NRA and NCPA enforce user protection provisions for postal services	
Users of private operators covered	Within US: Yes	Outside US: Yes
Publication of annual statistics	By USP: Yes	By NRA: Yes
User complaints to USP reviewed, 2012	Percent of complaints (%): 53	

C. Market facts

C.1 Market size and demand (2011)

Letter post items per capita (EU-27 average)	249 (164)
Share C2X (revenue/volume)	16% (Volume)
Share B2X (revenue/volume)	84% (Volume)
Parcel & express items per capita	12
Share C2X (revenue/volume)	n/a
Share B2X (revenue/volume)	n/a

Market value in % of GDP (2011)



	Volume	Main developments since 2007
Domestic and inbound cross-border letter post	16,173m	Average growth rate 2007-2011: -3.6%
Outbound cross-border letter post	390m	Average growth rate 2007-2011: -5.6% Note: (Market survey NRA)
Domestic parcel & express	795m	
Outbound cross-border parcel & express	n/a	

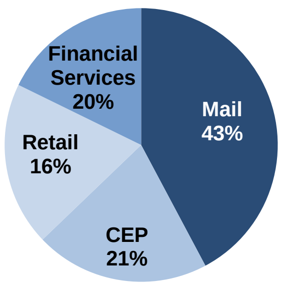
C.2 Market structure and key market players

	TOP3 Market share	Perceived competition	Key players
Domestic letter post	99.9%	NRA: Marginal USP: Marginal	La Poste
Outbound cross-border letter post	92.5%	NRA: n/a USP: Intense	La Poste (75%) BPI DHL Global Mail Royal Mail pring Swiss Post Österreichische Post IMX
Domestic parcel & express (total)	n/a	NRA: n/a USP: Other	Estimated USP market share: >30%
B2C	n/a	NRA: n/a USP: Other	La Poste, Colis Privé, Mondial Relay
B2B	n/a	NRA: n/a USP: Intense	TNT Express, DHL, Geopost
Outbound cross-border parcel & express	n/a	NRA: n/a USP: Intense	DHL, Geopost

C.3 La Poste (2012)

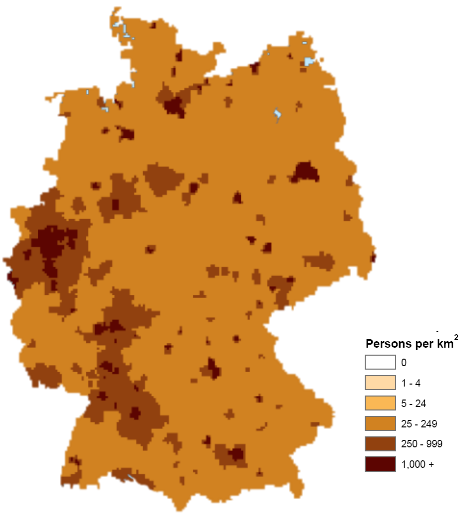
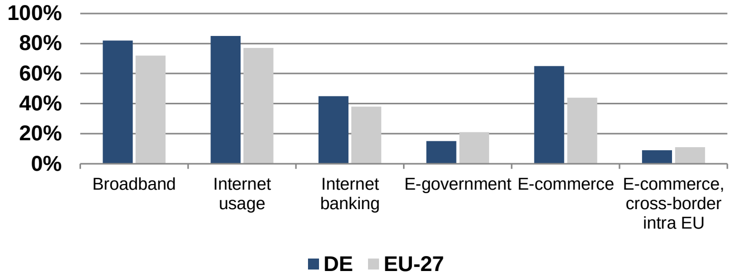
Legal status	plc
State ownership	100%
Total revenue	EUR 21,658m
Share national revenue	n/a
EBIT margin total / mail	3.8% / 6.0%
Employment, total (headcount / FTE)	243,172 / 266,618
Share civil servants (headcount)	50.4%
Share part-time	n/a
Share wage costs on total costs	60.5%

Revenue structure (2012)



GERMANY

A. Country facts

Total population (2012)	81.8m	**Germany** 
Population density (2012)	229 / sqkm	
Urbanisation rate (2011)	74%	
GDP growth rate (DE / EU-27)	2010: 4.2% 2011: 3.0% 2012: 0.7%	
GDP per capita in PPS (2011) (in % EU-27 average)	30,300 (121%)	
Transparency International CPI 2012 Score (Max. 100)	79	
ICT indicators (2012)		
Online purchase per capita	EUR 433	Average growth rate (2007-2011): 16%

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	Federal Ministry of Economics and Technology
Ministry for ownership of PPO	---
National regulatory authority	Federal Network Agency for Electricity, Gas, Telecommunications, Post and Railways

B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 3	Appointed by: Other
NRA resources, 2012	Budget:	Professional staff: ---
NRA authority to levy fines	Yes	Limit: 500000
NRA authority to order remedies	Yes	
NRA right to data from USP	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	
NRA right to data from non-USPs	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	

B.3 National Competition Autority			
National competition authority	Bundeskartellamt		
Primary authority for competition rules	National regulatory authority for postal affairs (NRA)		
NRA/NCA cooperation	Share data: Yes	Regular consult: Yes	Coord agmt: No
NCA decisions since 2009	▪ VI-U (Kart) 14/11 - OLG Düsseldorf, 1&1-Internet/Deutsche Post ▪ VI-U (Kart) 17/08 - OLG Düsseldorf, Mail consolidator/Deutsche Post ▪ Deutsche Post		
State aid cases	SA.17653 - Complaint against Germany for unlawful state aid to Deutsche Post		

B.4 Scope of Universal Service			
Service	**Ensured**	**Price regulated**	**Service standards**
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	No	---	---
Bulk advertisements	No	Yes	No answer
Newspapers, magazines, etc.	No	Yes	Yes
Non-priority correspondence	No	---	---
Single piece parcels	Yes	Yes	Yes
Bulk parcels	No	---	---
Delivery frequency for LP	6 days per week		
Delivery frequency for parcels	6 days per week	Delivery point: Parcels must be delivered without charge to addressee	

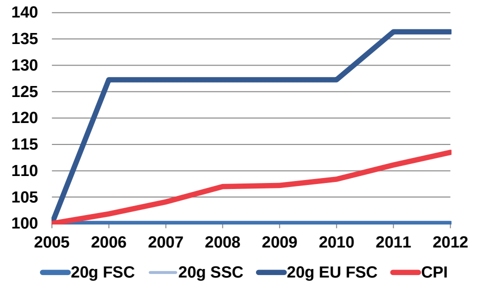
B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: All cross-border services	Second agency: ---	
EU v. UPU law, intra-EU	UPU provisions apply except for EU competition and customs rules		
EU v. UPU law, extra-EU	UPU provisions apply except for EU competition and customs rules		
Enforcement of Art. 13	Cost based TDs: No answer	Related to QoS: No answer	Transparent: No answer
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	No answer		
NRA prohibits discrimination between inbound mail from different EU mailers?	---	TD regimes: ---	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	No answer	TD regimes: ---	
Overalll net gain/ loss due to TDs not aligned to domestic postage	No answer		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): ---	Volume (%) : ---	
Choice between market forces, designation, and procurement	Study: No	National USP appointed by legislation: No	
Method of ensuring US	Mkt force (%): 100	Designation (%): 0	Procurement (%): 0
Households not receiving US	Letter post (% pop): 0	Parcels (% pop): 0	
Net cost of US0 in 2012	Pct USP exp: ---	Net cost study: No	
USO financed from public funds	No		

USO financed from compensation fund	Authorized: Yes	Established: No

B.7 Universal service indicators

Price trend	2010	2013
20g FSC, domestic	EUR 0.55	EUR 0.58
20g SSC, domestic		
20g FSC, EU	EUR 0.70	EUR 0.75
5kg parcel, domestic	EUR 6.90	EUR 6.90
5kg parcel, cross-border (lowest tariff)	EUR 17.00	EUR 17.00



Quality of service	2010	2012	USP customer satisfaction index
Domestic target (D+1)	80%	80%	2010: 93% 2011: 95% 2012: 92%
Performance (D+1)	92.8%	92.3%	
Postal outlets (total)	36,546	27,205 (2011)	
Postal outlets per 10,000 inhabitants	4.47	3.33 (2011)	
Share post offices	0.1%	0.1% (2011)	

B.8 Legal Treatment of Competitive Services

Special tariffs are transparent and non-discriminatory?	Bulk letters: Required by law and verified in practice	Direct mail: Required by law but not verified in practice	Bulk parcels: Required by law and verified in practice
Special tariffs are available to other postal operators?	Bulk letters: Required by law and verified in practice	Direct mail: Required by law and verified in practice	Bulk parcels: Required by law and verified in practice
Licence required within US area	Licence required for provision of some services with the universal service area		
Use of potentially restrictive authorisation conditions	Univ. servs: No	Quality conditions: No	Competence: Yes
Access to postal infrastructure by competitors	Addr. database: Yes	Post office boxes: Yes	Delivery boxes: Yes
VAT: USP services exempt	other;		
Customs: USP services subject to UPU customs rules	other;		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: No	USP accepts inbound mail from EU/EEA ETOEs?: Unknown, no information	
Intra-EU remail restrictions	ABA remail: Unknown, no information	ABC remail: Unknown, no information	
Labour law: special rules in postal sector	No		

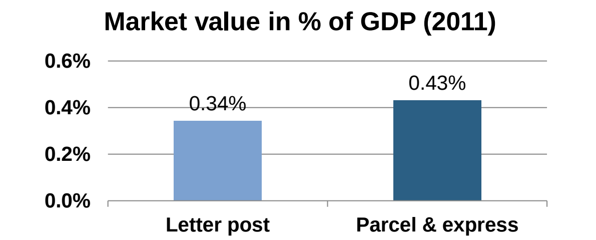
B.9 Protections of Users

Protection of users by law	Yes	Postal laws and/or regulations include user protection provisions.
Implementing authority(ies)	Other	
Users of private operators covered	Within US: Yes	Outside US: Yes
Publication of annual statistics	By USP: No	By NRA: Yes
User complaints to USP reviewed, 2012	Percent of complaints (%): 400	

C. Market facts

C.1 Market size and demand (2011)

Letter post items per capita (EU-27 average)	218 (164)
Share C2X (revenue/volume)	7% (Volume)
Share B2X (revenue/volume)	93% (Volume)
Parcel & express items per capita	29
Share C2X (revenue/volume)	n/a
Share B2X (revenue/volume)	n/a



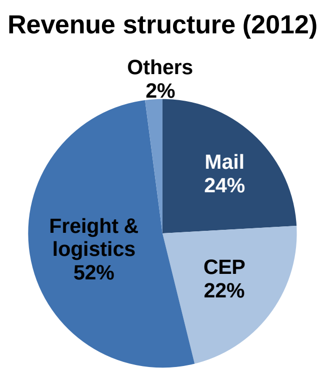
	Volume	Main developments since 2007 and future trends
Domestic and inbound cross-border letter post	17,813m	Average growth rate 2007-2011: -1.7%
Outbound cross-border letter post	600m	Average growth rate 2007-2011: 1.2% Note: (Market survey NRA)
Domestic parcel & express	2,400m	
Outbound cross-border parcel & express	n/a	

C.2 Market structure and key market players

	TOP3 Market share	Perceived competition	Key players
Domestic letter post	90%	NRA: Low USP: Intense	DPAG (90%) TNT Post Deutschland Holtzbrinck Gruppe (USP answer)
Outbound cross-border letter post	n/a	NRA: n/a USP: Intense	Asendia Austrian Post International Spring
Domestic parcel & express (total)	46%	NRA: Substantial USP: Intense	Estimated USP market share: 25-30%
B2C	n/a	NRA: Moderate USP: Intense	DPAG / DHL, DPD, Hermes, GLS, UPS
B2B	n/a	NRA: Intense USP: n/a	Deutsche Post DHL, DPD Germany, GLS, TNT Express, UPS
Outbound cross-border parcel & express	n/a	NRA: n/a USP: n/a	DHL, DPD, GLS, UPS

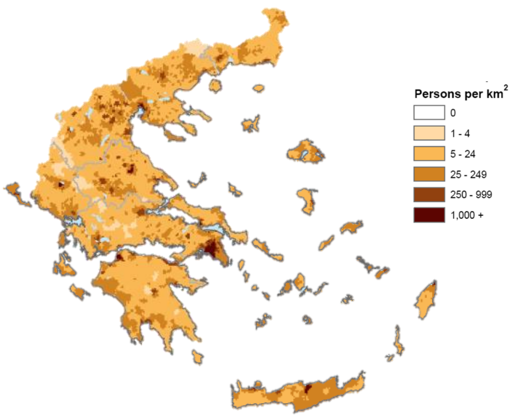
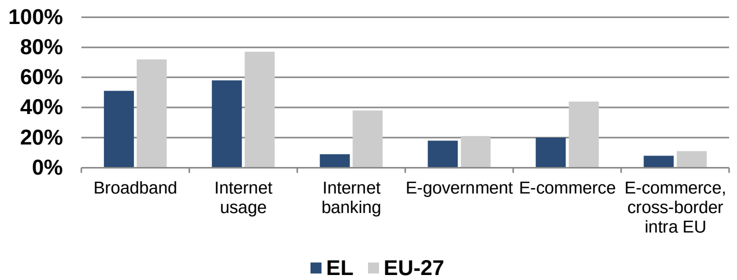
C.3 Deutsche Post DHL (2012)

Legal status	plc IPO 2001
State ownership	25.5% 25.5% (via KfW)
Total revenue	EUR 55,512m
Share national revenue	30%
EBIT margin total / mail	4.8% / 7.5%
Employment, total (headcount / FTE)	472,321 / 428,129
Share civil servants (headcount)	9%
Share part-time	n/a
Share wage costs on total costs	32.3%



GREECE

A. Country facts

Total population (2012)	11.3m	**Greece** 
Population density (2012)	86 / sqkm	
Urbanisation rate (2011)	62%	
GDP growth rate (EL / EU-27)	2010: -4.9% 2011: -7.1% 2012: -6.4%	
GDP per capita in PPS (2011) (in % EU-27 average)	20,100 (80%)	
Transparency International CPI 2012 Score (Max. 100)	36	
ICT indicators (2012)		
Online purchase per capita	EUR 150	Average growth rate (2007-2011): 61%

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	Ministry of Development, Competitiveness, Infrastructure, Transport and Networks
Ministry for ownership of PPO	Ministry of Development, Competitiveness, Infrastructure, Transport and Networks and Monitoring Committee of Management Contract
National regulatory authority	Hellenic Telecommunications And Post Commission

B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 9	Appointed by: Council of Ministers or Prime Minister
NRA resources, 2012	Budget: 1000000	Professional staff: 12
NRA authority to levy fines	Yes	Limit: 350000
NRA authority to order remedies	Yes	
NRA right to data from USP	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	
NRA right to data from non-USPs	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	

B.3 National Competition Autority			
National competition authority	Hellenic Competition Commission		
Primary authority for competition rules	National regulatory authority for postal affairs (NRA)		
NRA/NCA cooperation	Share data: Yes	Regular consult: No	Coord agmt: No answer
NCA decisions since 2009			
State aid cases	SA.32562 - Aid to the Hellenic Post		

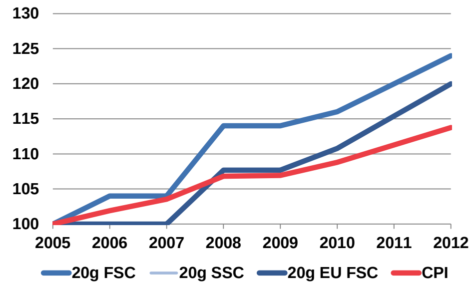
B.4 Scope of Universal Service			
Service	**Ensured**	**Price regulated**	**Service standards**
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	Yes	Yes	No
Bulk advertisements	Yes	Yes	No
Newspapers, magazines, etc.	Yes	Yes	No
Non-priority correspondence	Yes	Yes	No
Single piece parcels	Yes	Yes	No
Bulk parcels	No	Yes	No
Delivery frequency for LP	5 days per week		
Delivery frequency for parcels	5 days per week	Delivery point: Parcels required only to be held at postal outlet nearest addressee	

B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: Other	Second agency: ---	
EU v. UPU law, intra-EU	UPU provisions apply except for EU competition rules		
EU v. UPU law, extra-EU	UPU provisions apply except for EU competition rules		
Enforcement of Art. 13	Cost based TDs: Yes	Related to QoS: Yes	Transparent: Yes
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	Yes		
NRA prohibits discrimination between inbound mail from different EU mailers?	---	TD regimes: Reims TDs;	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	Yes	TD regimes: Reims TDs;	
Overalll net gain/ loss due to TDs not aligned to domestic postage	Moderate net gain compared to current outbound revenue		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): 6	Volume (%) : ---	
Choice between market forces, designation, and procurement	Study: No	National USP appointed by legislation: Yes	
Method of ensuring US	Mkt force (%): ---	Designation (%): 99	Procurement (%): ---
Households not receiving US	Letter post (% pop): 8.5	Parcels (% pop): ---	
Net cost of US0 in 2012	Pct USP exp: ---	Net cost study: Yes	
USO financed from public funds	No		
USO financed from compensation fund	Authorized: Yes	Established: No	

B.7 Universal service indicators

Price trend	2010	2013
20g FSC, domestic	EUR 0.58	EUR 0.62
20g SSC, domestic	EUR 0.53	EUR 0.57
20g FSC, EU	EUR 0.72	EUR 0.78
5kg parcel, domestic	EUR 5.70	EUR 6.10
5kg parcel, cross-border (lowest tariff)	EUR 39.70	



Quality of service	2010	2012	USP customer satisfaction index
Domestic target (D+1)	87%	87%	
Performance (D+1)	87.7%	91.6%	
Postal outlets (total)	1,597	1,538	
Postal outlets per 10,000 inhabitants	1.41	1.36	
Share post offices	54.5%	52.5%	

B.8 Legal Treatment of Competitive Services

Special tariffs are transparent and non-discriminatory?	Bulk letters: Required by law and verified in practice	Direct mail: Required by law and verified in practice	Bulk parcels: Required by law and verified in practice
Special tariffs are available to other postal operators?	Bulk letters: Required by law but not verified in practice	Direct mail: Required by law but not verified in practice	Bulk parcels: Required by law but not verified in practice
Licence required within US area	Licence required for provision of some services with the universal service area		
Use of potentially restrictive authorisation conditions	Univ. servs: No	Quality conditions: No	Competence: No
Access to postal infrastructure by competitors	Addr. database: Yes	Post office boxes: No	Delivery boxes: No
VAT: USP services exempt	other;		
Customs: USP services subject to UPU customs rules	other;		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: Yes	USP accepts inbound mail from EU/EEA ETOEs?: No	
Intra-EU remail restrictions	ABA remail: No	ABC remail: No	
Labour law: special rules in postal sector	No		

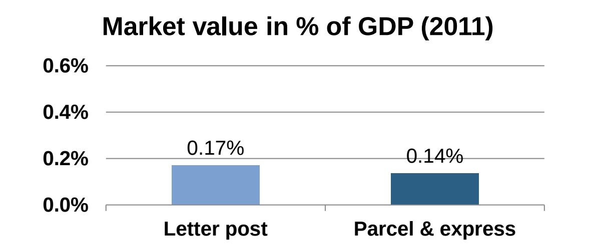
B.9 Protections of Users

Protection of users by law	Yes	Both postal and consumer protection laws apply to postal users.
Implementing authority(ies)	Both NRA and NCPA enforce user protection provisions for postal services	
Users of private operators covered	Within US: Yes	Outside US: Yes
Publication of annual statistics	By USP: Yes	By NRA: No
User complaints to USP reviewed, 2012	Percent of complaints (%): ---	

C. Market facts

C.1 Market size and demand (2011)

Letter post items per capita (EU-27 average)	44 (164)
Share C2X (revenue/volume)	14% (Volume)
Share B2X (revenue/volume)	86% (Volume)
Parcel & express items per capita	4
Share C2X (revenue/volume)	18% (n/a)
Share B2X (revenue/volume)	82% (n/a)



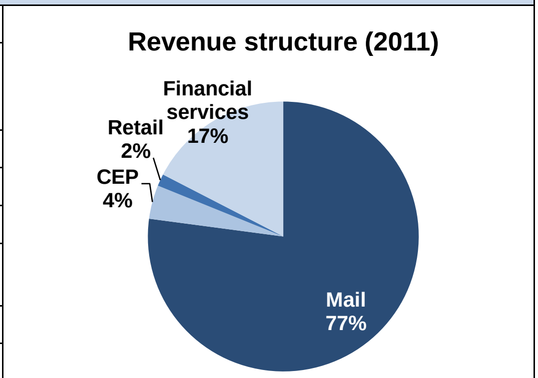
	Volume	Main developments since 2007
Domestic and inbound cross-border letter post	502m	Average growth rate 2007-2011: -6.9%
Outbound cross-border letter post	30.34m	Average growth rate 2007-2011: -9.4% Note: (Market survey NRA)
Domestic parcel & express	50.23m	
Outbound cross-border parcel & express	n/a	

C.2 Market structure and key market players

	TOP3 Market share	Perceived competition	Key players
Domestic letter post	100%	NRA: Low USP: Intense	ELTA
Outbound cross-border letter post	100%	NRA: Low USP: Intense	n/a
Domestic parcel & express (total)	75%	NRA: Intense USP: Intense	Estimated USP market share: 5-10%
B2C	n/a	NRA: Intense USP: Intense	ELTA Courier, ACS, Geniki Taxydromiki
B2B	n/a	NRA: Intense USP: Intense	ELTA Courier, ACS, Geniki Taxydromiki
Outbound cross-border parcel & express	n/a	NRA: Substantial USP: Intense	DHL, TNT Express, UPS

C.3 ELTA (2011)

Legal status	plc
State ownership	90% 10% (Hellenic Postal Savings Bank)
Total revenue	EUR 482m
Share national revenue	100%
EBIT margin total / mail	1.2% / n/a
Employment, total (headcount / FTE)	9,134 / 7,698
Share civil servants (headcount)	n/a
Share part-time	n/a
Share wage costs on total costs	72.9%

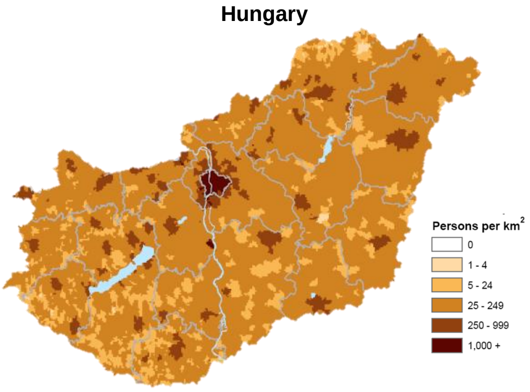


Based on IPC, Carrier Intelligence Report Hellenic Post-ELTA

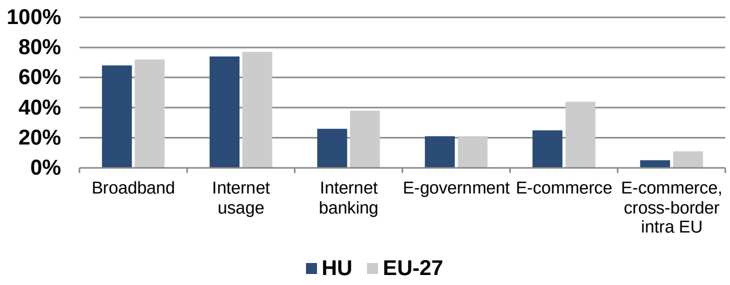
HUNGARY

A. Country facts

Total population (2012)	10.0m
Population density (2012)	107 / sqkm
Urbanisation rate (2011)	69%
GDP growth rate (HU / EU-27)	2010: 1.3% 2011: 1.6% 2012: -1.7%
GDP per capita in PPS (2011) (in % EU-27 average)	16,500 (66%)
Transparency International CPI 2012 Score (Max. 100)	55



ICT indicators (2012)



Online purchase per capita	EUR 62	Average growth rate (2007-2011): 36%

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	Ministry of National Development
Ministry for ownership of PPO	---
National regulatory authority	National Media Communications Authority

B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 1	Appointed by: Council of Ministers or Prime Minister
NRA resources, 2012	Budget: 488613	Professional staff: 6
NRA authority to levy fines	Yes	Limit: 173144,342820258
NRA authority to order remedies	Yes	
NRA right to data from USP	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	
NRA right to data from non-USPs	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	

B.3 National Competition Autority			
National competition authority	Hungarian Competition Authority		
Primary authority for competition rules	National competition authority (NCA)		
NRA/NCA cooperation	Share data: Yes	Regular consult: No	Coord agmt: Yes
NCA decisions since 2009			
State aid cases			

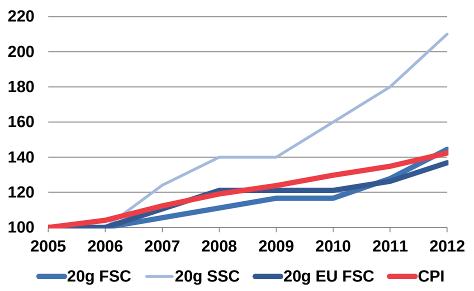
B.4 Scope of Universal Service			
Service	**Ensured**	**Price regulated**	**Service standards**
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	No	No	Yes
Bulk advertisements	No	No	Yes
Newspapers, magazines, etc.	No	No	No
Non-priority correspondence	Yes	Yes	Yes
Single piece parcels	Yes	Yes	Yes
Bulk parcels	Yes	Yes	Yes
Delivery frequency for LP	5 days per week		
Delivery frequency for parcels	5 days per week	Delivery point: Parcels must be delivered without charge to addressee	

B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: All cross-border services	Second agency: ---	
EU v. UPU law, intra-EU	EU law apply even if contrary to UPU provisions		
EU v. UPU law, extra-EU	EU law apply even if contrary to UPU provisions		
Enforcement of Art. 13	Cost based TDs: Yes	Related to QoS: Yes	Transparent: Yes
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	Yes		
NRA prohibits discrimination between inbound mail from different EU mailers?	11	TD regimes: 2008 UPU new target system; 2008 UPU transitional system; Reims TDs; bilateral TD agreements;	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	Yes	TD regimes: 2008 UPU new target system;	
Overalll net gain/ loss due to TDs not aligned to domestic postage	---		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): 40	Volume (%) : 35	
Choice between market forces, designation, and procurement	Study: Yes	National USP appointed by legislation: Yes	
Method of ensuring US	Mkt force (%): ---	Designation (%): ---	Procurement (%): ---
Households not receiving US	Letter post (% pop): 0	Parcels (% pop): 0	
Net cost of US0 in 2012	Pct USP exp: ---	Net cost study: No	
USO financed from public funds	No		
USO financed from compensation fund	Authorized: Yes	Established: No	

B.7 Universal service indicators

Price trend	2010	2013
20g FSC, domestic	EUR 0.38	EUR 0.49
20g SSC, domestic	EUR 0.29	EUR 0.38
20g FSC, EU	EUR 0.83	EUR 0.91
5kg parcel, domestic	EUR 3.59	EUR 4.16
5kg parcel, cross-border (lowest tariff)	EUR 27.62	EUR 30.11



Quality of service	2010	2012	USP customer satisfaction index
Domestic target (D+1)	85%	85%	
Performance (D+1)	93.7%	93%	
Postal outlets (total)	2,744	2,741	
Postal outlets per 10,000 inhabitants	2.74	2.75	
Share post offices	74%	81.2%	

B.8 Legal Treatment of Competitive Services

Special tariffs are transparent and non-discriminatory?	Bulk letters: Required by law but not verified in practice	Direct mail: Required by law but not verified in practice	Bulk parcels: Required by law but not verified in practice
Special tariffs are available to other postal operators?	Bulk letters: Required by law but not verified in practice	Direct mail: Required by law but not verified in practice	Bulk parcels: Required by law but not verified in practice
Licence required within US area	Licence required for provision of some services with the universal service area		
Use of potentially restrictive authorisation conditions	Univ. servs: Yes	Quality conditions: Yes	Competence: Yes
Access to postal infrastructure by competitors	Addr. database: No	Post office boxes: No	Delivery boxes: Yes
VAT: USP services exempt	Single piece letters; single piece parcels; outbound letter post; outbound parcel post;		
Customs: USP services subject to UPU customs rules	other;		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: No	USP accepts inbound mail from EU/EEA ETOEs?: No	
Intra-EU remail restrictions	ABA remail: Yes	ABC remail: Yes	
Labour law: special rules in postal sector	Yes		

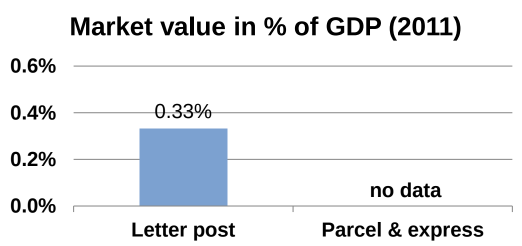
B.9 Protections of Users

Protection of users by law	Yes	Both postal and consumer protection laws apply to postal users.
Implementing authority(ies)	Both NRA and NCPA enforce user protection provisions for postal services	
Users of private operators covered	Within US: Yes	Outside US: Yes
Publication of annual statistics	By USP: Yes	By NRA: Yes
User complaints to USP reviewed, 2012	Percent of complaints (%): 98	

C. Market facts

C.1 Market size and demand (2011)

Letter post items per capita (EU-27 average)	90 (164)
Share C2X (revenue/volume)	3% (Volume)
Share B2X (revenue/volume)	97% (Volume)
Parcel & express items per capita	n/a
Share C2X (revenue/volume)	20% (n/a)
Share B2X (revenue/volume)	80% (n/a)



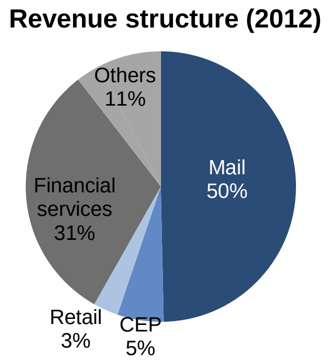
	Volume	Main developments since 2007
Domestic and inbound cross-border letter post	899m	Average growth rate 2007-2011: -2.7%
Outbound cross-border letter post	12.68m	Average growth rate 2007-2011: -4.9% Note: (USP data)
Domestic parcel & express	n/a	
Outbound cross-border parcel & express	n/a	

C.2 Market structure and key market players

	TOP3 Market share	Perceived competition	Key players
Domestic letter post	100%	NRA: Marginal USP: Moderate	HUUSP
Outbound cross-border letter post	100%	NRA: Marginal USP: Low	Magyar Posta DHL Global Mail G3 Worldwide
Domestic parcel & express (total)	65%	NRA: Substantial USP: Intense	Estimated USP market share: 25-30%
B2C	n/a	NRA: Substantial USP: Intense	Hungarian Post, GLS, Feibra
B2B	n/a	NRA: Substantial USP: Intense	Hungarian Post, GLS Hungary, trans-o-flex Hungary (Austrian Post)
Outbound cross-border parcel & express	60%	NRA: Substantial USP: Intense	DHL, DPD, Hungarian Post, UPS

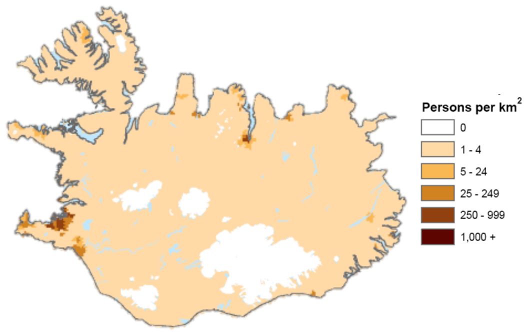
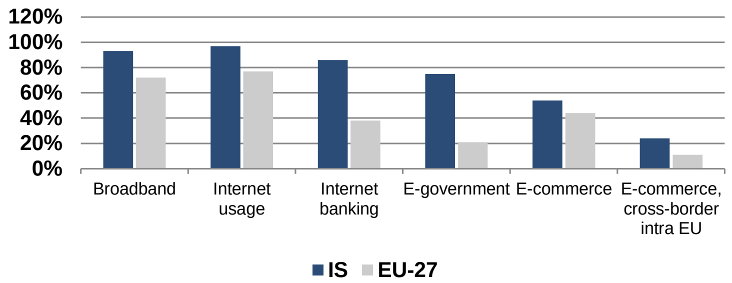
C.3 Magyar Posta (2012)

Legal status	plc
State ownership	100%
Total revenue	EUR 667m
Share national revenue	99%
EBIT margin total / mail	2.1% / n/a
Employment, total (headcount / FTE)	33,579 / 32,214
Share civil servants (headcount)	0%
Share part-time	17.2%
Share wage costs on total costs	60%



ICELAND

A. Country facts

		Iceland
Total population (2012)	0.3m	
Population density (2012)	3 / sqkm	
Urbanisation rate (2011)	94%	
GDP growth rate (IS / EU-27)	2010: -4.1% 2011: 2.9% 2012: 1.6%	
GDP per capita in PPS (2011) (in % EU-27 average)	28,000 (112%)	
Transparency International CPI 2012 Score (Max. 100)	82	
ICT indicators (2012)		
Online purchase per capita	n.a.	Average growth rate (2007-2011): n.a.

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	Ministry of the interior.
Ministry for ownership of PPO	The Ministry of Finance
National regulatory authority	Post and Telecom Administration

B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 1	Appointed by: Postal Minister or ministry staff
NRA resources, 2012	Budget: 115394	Professional staff: 3
NRA authority to levy fines	Yes	Limit: 3,11876052971524
NRA authority to order remedies	Yes	
NRA right to data from USP	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	
NRA right to data from non-USPs	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	

B.3 National Competition Autority			
National competition authority	Icelandic Competition Authority		
Primary authority for competition rules	National competition authority (NCA)		
NRA/NCA cooperation	Share data: Yes	Regular consult: Yes	Coord agmt: ---
NCA decisions since 2009			
State aid cases			

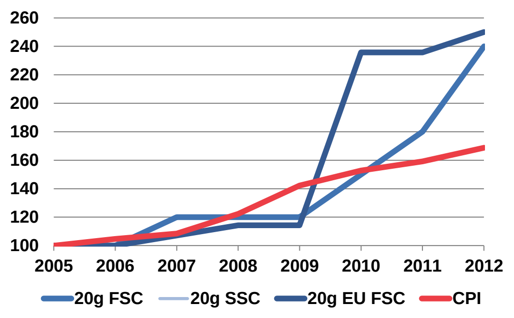
B.4 Scope of Universal Service			
Service	**Ensured**	**Price regulated**	**Service standards**
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	Yes	Yes	Yes
Bulk advertisements	No	No	No
Newspapers, magazines, etc.	Yes	Yes	No
Non-priority correspondence	Yes	Yes	Yes
Single piece parcels	No	---	---
Bulk parcels	No	---	---
Delivery frequency for LP	5 days per week		
Delivery frequency for parcels	5 days per week	Delivery point: No answer	

B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: ---	Second agency: ---	
EU v. UPU law, intra-EU	NA		
EU v. UPU law, extra-EU	NA		
Enforcement of Art. 13	Cost based TDs: Yes	Related to QoS: Yes	Transparent: No
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	Yes		
NRA prohibits discrimination between inbound mail from different EU mailers?	4	TD regimes: 2008 UPU old target system; 2008 UPU new target system; 2008 UPU transitional system; Reims TDs;	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	No	TD regimes: 2008 UPU old target system; 2008 UPU new target system; 2008 UPU transitional system; Reims TDs;	
Overalll net gain/ loss due to TDs not aligned to domestic postage	Substantial net gain compared to current outbound revenue		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): 5	Volume (%) : ---	
Choice between market forces, designation, and procurement	Study: No	National USP appointed by legislation: Yes	
Method of ensuring US	Mkt force (%): ---	Designation (%): ---	Procurement (%): ---
Households not receiving US	Letter post (% pop): 0.125	Parcels (% pop): ---	
Net cost of US0 in 2012	Pct USP exp: ---	Net cost study: No	
USO financed from public funds	No		
USO financed from compensation fund	Authorized: Yes	Established: No	

B.7 Universal service indicators

Price trend	2010	2013
20g FSC, domestic	EUR 0.46	EUR 0.72
20g SSC, domestic		EUR 0.62
20g FSC, EU	EUR 1.02	EUR 1.05
5kg parcel, domestic	EUR 5.70	EUR 6.42
5kg parcel, cross-border (lowest tariff)	EUR 28.85	EUR 29.81



Quality of service	2010	2012
Domestic target (D+1)	85%	85%
Performance (D+1)	87%	89%
Postal outlets (total)	83	75
Postal outlets per 10,000 inhabitants	2.61	2.35
Share post offices	47%	52%

USP customer satisfaction index

B.8 Legal Treatment of Competitive Services

Special tariffs are transparent and non-discriminatory?	Bulk letters: Required by law and verified in practice	Direct mail: Required by law and verified in practice	Bulk parcels: ---
Special tariffs are available to other postal operators?	Bulk letters: Required by law and verified in practice	Direct mail: Required by law and verified in practice	Bulk parcels: ---
Licence required within US area	Licence required for provision of some services with the universal service area		
Use of potentially restrictive authorisation conditions	Univ. servs: No	Quality conditions: Yes	Competence: No
Access to postal infrastructure by competitors	Addr. database: No	Post office boxes: No answer	Delivery boxes: Yes
VAT: USP services exempt	---		
Customs: USP services subject to UPU customs rules	other;		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: No	USP accepts inbound mail from EU/EEA ETOEs?: No	
Intra-EU remail restrictions	ABA remail: No	ABC remail: No	
Labour law: special rules in postal sector	No		

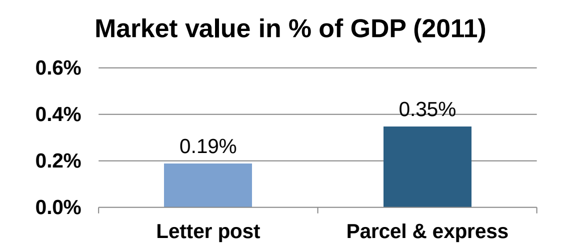
B.9 Protections of Users

Protection of users by law	Yes	Both postal and consumer protection laws apply to postal users.
Implementing authority(ies)	Both NRA and NCPA enforce user protection provisions for postal services	
Users of private operators covered	Within US: Yes	Outside US: Yes
Publication of annual statistics	By USP: No	By NRA: No
User complaints to USP reviewed, 2012	Percent of complaints (%): ---	

C. Market facts

C.1 Market size and demand (2011)

Letter post items per capita (EU-27 average)	127 (164)
Share C2X (revenue/volume)	25% (Volume)
Share B2X (revenue/volume)	75% (Volume)
Parcel & express items per capita	n/a
Share C2X (revenue/volume)	15% (Revenue)
Share B2X (revenue/volume)	85% (Revenue)



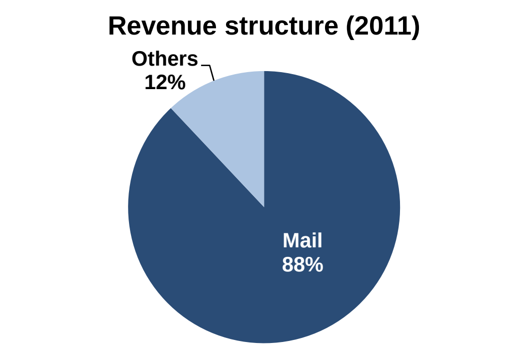
	Volume	Main developments since 2007
Domestic and inbound cross-border letter post	40m	Average growth rate 2007-2011: n/a
Outbound cross-border letter post	1.48m	Average growth rate 2007-2011: n/a Note: USP data
Domestic parcel & express	n/a	
Outbound cross-border parcel & express	n/a	

C.2 Market structure and key market players

	TOP3 Market share	Perceived competition	Key players
Domestic letter post	97%	NRA: Low USP: n/a	Íslandspóstur (76%) Póstdreifing Póstmarkaðurinn
Outbound cross-border letter post	100%	NRA: Low USP: n/a	Íslandspóstur
Domestic parcel & express (total)	n/a	NRA: Substantial USP: n/a	Estimated USP market share: n/a
B2C	n/a	NRA: Substantial USP: n/a	n/a
B2B	n/a	NRA: Substantial USP: n/a	n/a
Outbound cross-border parcel & express	n/a	NRA: Substantial USP: n/a	n/a

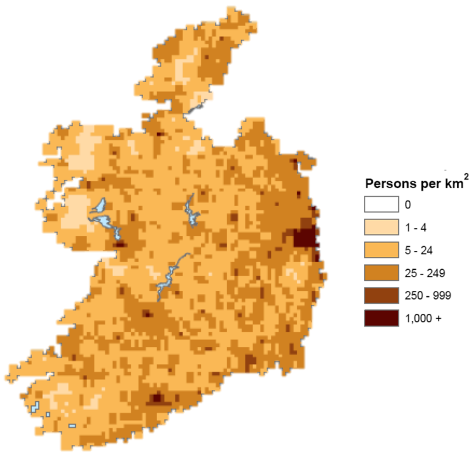
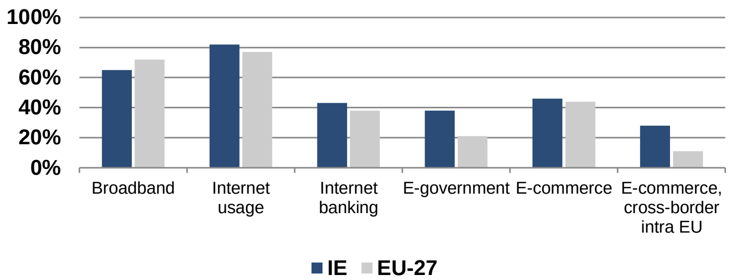
C.3 Íslandspóstur (2011)

Legal status	plc
State ownership	100%
Total revenue	EUR 40m
Share national revenue	n/a
EBIT margin total / mail	-0.9% / n/a
Employment, total (headcount / FTE)	n/a / 845
Share civil servants (headcount)	n/a
Share part-time	n/a
Share wage costs on total costs	58.1%



IRELAND

A. Country facts

<table>
<tr><td>Total population (2012)</td><td>4.6m</td><td rowspan="6">Ireland

</td></tr>
<tr><td>Population density (2012)</td><td>66 / sqkm</td></tr>
<tr><td>Urbanisation rate (2011)</td><td>62%</td></tr>
<tr><td>GDP growth rate (IE / EU-27)</td><td>2010: -0.8%
2011: 1.4%
2012: 0.7%</td></tr>
<tr><td>GDP per capita in PPS (2011)
(in % EU-27 average)</td><td>32,500 (129%)</td></tr>
<tr><td>Transparency International CPI 2012 Score (Max. 100)</td><td>69</td></tr>
<tr><td>ICT indicators (2012)</td><td colspan="2">
</td></tr>
<tr><td>Online purchase per capita</td><td>EUR 810</td><td>Average growth rate (2007-2011): 23%</td></tr>
</table>

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	Department of Communications, Energy and Natural Resources
Ministry for ownership of PPO	---
National regulatory authority	Commission for Communication Regulation

<table>
<tr><th colspan="3">B.2 Organization and Authority of NRA</th></tr>
<tr><td>Head(s) of NRA</td><td>Number: 3</td><td>Appointed by: Postal Minister or ministry staff</td></tr>
<tr><td>NRA resources, 2012</td><td>Budget:</td><td>Professional staff: 1</td></tr>
<tr><td>NRA authority to levy fines</td><td>No</td><td>n/a</td></tr>
<tr><td>NRA authority to order remedies</td><td>---</td><td></td></tr>
<tr><td>NRA right to data from USP</td><td colspan="2">Compliance data: Yes for all postal services; Statistics: Yes for all postal services</td></tr>
<tr><td>NRA right to data from non-USPs</td><td colspan="2">Compliance data: Yes for all postal services; Statistics: Yes for all postal services</td></tr>
</table>

B.3 National Competition Autority			
National competition authority	The Competition Authority		
Primary authority for competition rules	National competition authority (NCA)		
NRA/NCA cooperation	Share data: Yes	Regular consult: Yes	Coord agmt: Yes
NCA decisions since 2009			
State aid cases			

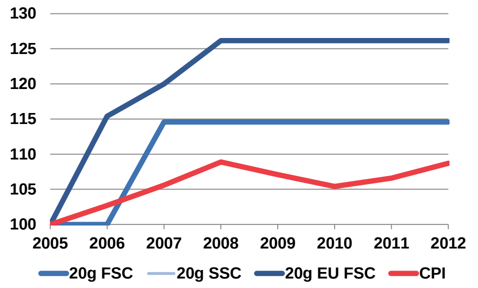
B.4 Scope of Universal Service			
Service	**Ensured**	**Price regulated**	**Service standards**
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	Yes	Yes	No
Bulk advertisements	Yes	Yes	---
Newspapers, magazines, etc.	No	---	---
Non-priority correspondence	No	---	---
Single piece parcels	Yes	Yes	No
Bulk parcels	Yes	---	No
Delivery frequency for LP	5 days per week		
Delivery frequency for parcels	5 days per week	Delivery point: Parcels must be delivered without charge to addressee	

B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: All cross-border services	Second agency: ---	
EU v. UPU law, intra-EU	EU law apply even if contrary to UPU provisions		
EU v. UPU law, extra-EU	EU law apply even if contrary to UPU provisions		
Enforcement of Art. 13	Cost based TDs: ---	Related to QoS: ---	Transparent: ---
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	---		
NRA prohibits discrimination between inbound mail from different EU mailers?	---	TD regimes: ---	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	---	TD regimes: ---	
Overalll net gain/ loss due to TDs not aligned to domestic postage	---		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): ---	Volume (%) : ---	
Choice between market forces, designation, and procurement	Study: No	National USP appointed by legislation: Yes	
Method of ensuring US	Mkt force (%): ---	Designation (%): 100	Procurement (%): ---
Households not receiving US	Letter post (% pop): 0.2	Parcels (% pop): 0.2	
Net cost of US0 in 2012	Pct USP exp: ---	Net cost study: ---	
USO financed from public funds	No		
USO financed from compensation fund	Authorized: No	Established: No	

B.7 Universal service indicators

Price trend	2010	2013
20g FSC, domestic	EUR 0.55	EUR 0.60
20g SSC, domestic		
20g FSC, EU	EUR 0.82	EUR 0.90
5kg parcel, domestic	EUR 14.00	EUR 14.50
5kg parcel, cross-border (lowest tariff)	EUR 40.00	EUR 42.00



Quality of service	2010	2012	USP customer satisfaction index
Domestic target (D+1)	94%	94%	
Performance (D+1)	85%	83% (2011)	
Postal outlets (total)	1,349	1,313	
Postal outlets per 10,000 inhabitants	3.02	2.87	
Share post offices	4.2%	4.3%	

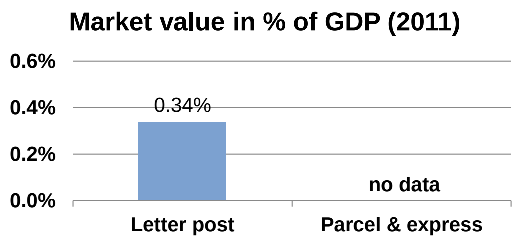
B.8 Legal Treatment of Competitive Services

Special tariffs are transparent and non-discriminatory?	Bulk letters: Required by law and verified in practice	Direct mail: ---	Bulk parcels: ---
Special tariffs are available to other postal operators?	Bulk letters: Required by law and verified in practice	Direct mail: ---	Bulk parcels: ---
Licence required within US area	General authorisation required for provision of some services with the universal service area		
Use of potentially restrictive authorisation conditions	Univ. servs: No	Quality conditions: No	Competence: No
Access to postal infrastructure by competitors	Addr. database: ---	Post office boxes: ---	Delivery boxes: Yes
VAT: USP services exempt	---		
Customs: USP services subject to UPU customs rules	---		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: ---	USP accepts inbound mail from EU/EEA ETOEs?: ---	
Intra-EU remail restrictions	ABA remail: ---	ABC remail: ---	
Labour law: special rules in postal sector	---		

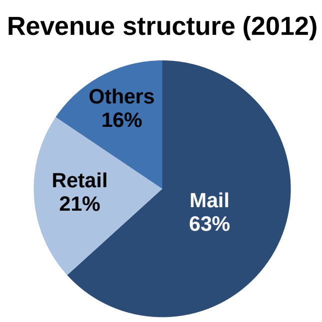
B.9 Protections of Users

Protection of users by law	Yes	Both postal and consumer protection laws apply to postal users.
Implementing authority(ies)	Both NRA and NCPA enforce user protection provisions for postal services	
Users of private operators covered	Within US: Yes	Outside US: Yes
Publication of annual statistics	By USP: ---	By NRA: Yes
User complaints to USP reviewed, 2012	Percent of complaints (%): ---	

C. Market facts

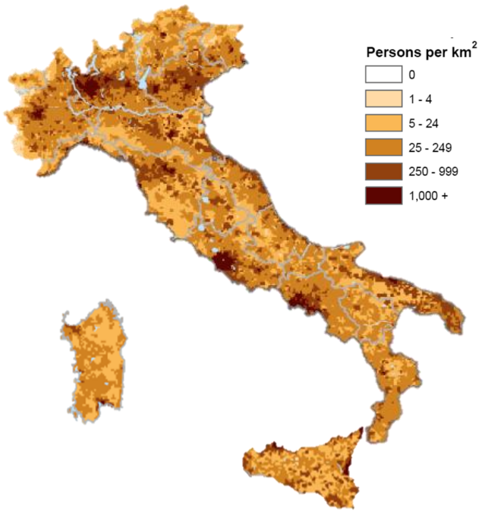
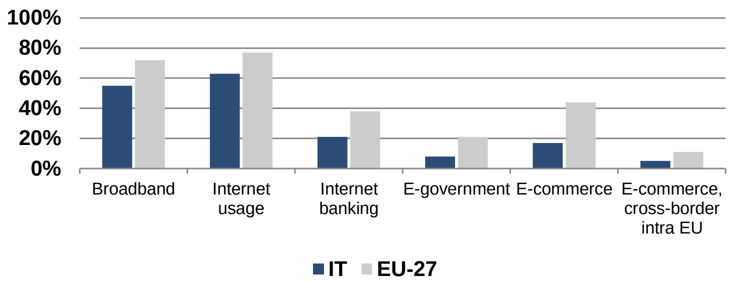
C.1 Market size and demand (2011)		
Letter post items per capita (EU-27 average)	148 (164)	
Share C2X (revenue/volume)	n/a	
Share B2X (revenue/volume)	n/a	
Parcel & express items per capita	n/a	
Share C2X (revenue/volume)	n/a	
Share B2X (revenue/volume)	n/a	
	Volume	**Main developments since 2007**
Domestic and inbound cross-border letter post	675m	Average growth rate 2007-2011: -3.2%
Outbound cross-border letter post	35.6m	Average growth rate 2007-2011: -15.9% Note: (USP data)
Domestic parcel & express	n/a	
Outbound cross-border parcel & express	n/a	

C.2 Market structure and key market players			
	TOP3 Market share	**Perceived competition**	**Key players**
Domestic letter post	100%	NRA: n/a USP: Low	An Post DX Eirpost (but not yet operational)
Outbound cross-border letter post	n/a	NRA: n/a USP: Moderate	An Post DHL Global Mail Spring Asendia
Domestic parcel & express (total)	n/a	NRA: n/a USP: Intense	Estimated USP market share: <20%
B2C	n/a	NRA: n/a USP: Low	An Post
B2B	n/a	NRA: n/a USP: Intense	An Post, DPD, Fastway, Nightline
Outbound cross-border parcel & express	n/a	NRA: n/a USP: Intense	An Post, DHL, DPD, UPS

C.3 An Post (2012)		
Legal status	plc	
State ownership	100%	
Total revenue	EUR 807m	
Share national revenue	90%	
EBIT margin total / mail	n/a / n/a	
Employment, total (headcount / FTE)	11,253 / 10,389	
Share civil servants (headcount)	19.1% (2011)	
Share part-time	23.6% (2011)	
Share wage costs on total costs	63.9%	

ITALY

A. Country facts

Total population (2012)	60.8m	**Italy** 
Population density (2012)	202 / sqkm	
Urbanisation rate (2011)	68%	
GDP growth rate (IT / EU-27)	2010: 1.7% 2011: 0.4% 2012: -2.4%	
GDP per capita in PPS (2011) (in % EU-27 average)	25,100 (100%)	
Transparency International CPI 2012 Score (Max. 100)	42	
ICT indicators (2012)		
Online purchase per capita	EUR 134	Average growth rate (2007-2011): 12%

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	Ministry of Economic Development - Department of Communications
Ministry for ownership of PPO	Ministry of Economy & Finance
National regulatory authority	Regulatory Authority for communications and media

B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 5	Appointed by: Other
NRA resources, 2012	Budget:	Professional staff: 6
NRA authority to levy fines	Yes	Limit: 1500000
NRA authority to order remedies	Yes	
NRA right to data from USP	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	
NRA right to data from non-USPs	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	

B.3 National Competition Autority			
National competition authority	Italian Competition Authority		
Primary authority for competition rules	National competition authority (NCA)		
NRA/NCA cooperation	Share data: No	Regular consult: Yes	Coord agmt: No
NCA decisions since 2009	▪ A438 - Selecta/Poste Italiane (on-going) ▪ A441 - Poste Italiane ▪ A413 - TNT/Poste Italiane ▪ A414 - Centro Servizi dirrite del cittadino/Poste Italiane		
State aid cases	SA.33989 - State compensations for the delivery of the universal service over 2009-2011 State compensations for reduced tariffs offered to publishers, not-for-profit organisations and electoral candidates over 2009-2011		

B.4 Scope of Universal Service			
Service	**Ensured**	**Price regulated**	**Service standards**
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	Yes	Yes	Yes
Bulk advertisements	No	No	No
Newspapers, magazines, etc.	Yes	Yes	No
Non-priority correspondence	No	No	No
Single piece parcels	Yes	Yes	Yes
Bulk parcels	No	No	No
Delivery frequency for LP	5 days per week		
Delivery frequency for parcels	5 days per week	Delivery point: Parcels must be delivered without charge to addressee	

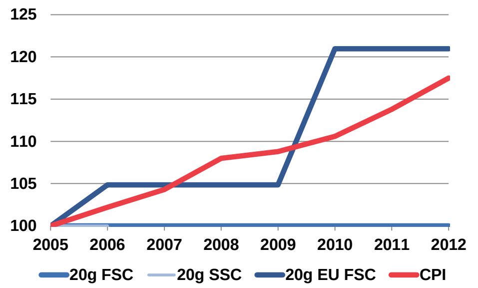
B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: All cross-border services	Second agency: ---	
EU v. UPU law, intra-EU	UPU provisions apply except for EU competition and customs rules		
EU v. UPU law, extra-EU	UPU provisions apply except for EU competition and customs rules		
Enforcement of Art. 13	Cost based TDs: Yes	Related to QoS: Yes	Transparent: No
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	Yes		
NRA prohibits discrimination between inbound mail from different EU mailers?	---	TD regimes: 2008 UPU old target system; Reims TDs;	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	Yes	TD regimes: 2008 UPU old target system; Reims TDs;	
Overalll net gain/ loss due to TDs not aligned to domestic postage	Substantial net gain compared to current outbound revenue		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): 0	Volume (%) : ---	
Choice between market forces, designation, and procurement	Study: No	National USP appointed by legislation: Yes	
Method of ensuring US	Mkt force (%): 1.5	Designation (%): 100	Procurement (%): 100
Households not receiving US	Letter post (% pop): ---	Parcels (% pop): ---	
Net cost of US0 in 2012	Pct USP exp: ---	Net cost study: Yes	
USO financed from public funds	Yes		

USO financed from compensation fund	Authorized: Yes	Established: Yes

B.7 Universal service indicators

Price trend	2010	2013
20g FSC, domestic	EUR 0.60	EUR 0.70
20g SSC, domestic		
20g FSC, EU	EUR 0.75	EUR 0.85
5kg parcel, domestic	EUR 7.00	EUR 9.10
5kg parcel, cross-border (lowest tariff)		



Quality of service	2010	2012
Domestic target (D+1)	89%	89%
Performance (D+1)	92%	94.7% (2011)
Postal outlets (total)	14,005	14,000
Postal outlets per 10,000 inhabitants	2.32	2.30
Share post offices	100%	100%

USP customer satisfaction index

B.8 Legal Treatment of Competitive Services

Special tariffs are transparent and non-discriminatory?	Bulk letters: Other	Direct mail: Not required by law or verified in practice	Bulk parcels: Other
Special tariffs are available to other postal operators?	Bulk letters: Other	Direct mail: Not required by law but verified in practice	Bulk parcels: Other
Licence required within US area	Licence required for provision of some services with the universal service area		
Use of potentially restrictive authorisation conditions	Univ. servs: No	Quality conditions: Yes	Competence: No
Access to postal infrastructure by competitors	Addr. database: No	Post office boxes: Yes	Delivery boxes: Yes
VAT: USP services exempt	Single piece letters; single piece parcels; newspapers/periodicals; bulk parcels; outbound letter post; outbound parcel post; outbound express;		
Customs: USP services subject to UPU customs rules	other;		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: No	USP accepts inbound mail from EU/EEA ETOEs?: No	
Intra-EU remail restrictions	ABA remail: No	ABC remail: No	
Labour law: special rules in postal sector	No		

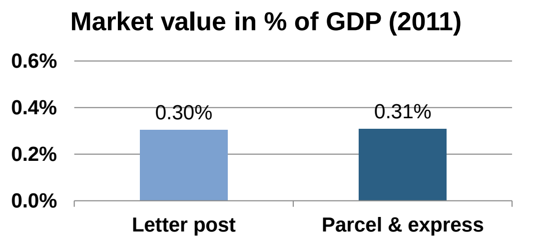
B.9 Protections of Users

Protection of users by law	Yes	Both postal and consumer protection laws apply to postal users.
Implementing authority(ies)	Both NRA and NCPA enforce user protection provisions for postal services	
Users of private operators covered	Within US: Yes	Outside US: Yes
Publication of annual statistics	By USP: Yes	By NRA: ---
User complaints to USP reviewed, 2012	Percent of complaints (%): 450	

C. Market facts

C.1 Market size and demand (2011)

Letter post items per capita (EU-27 average)	73 (164)
Share C2X (revenue/volume)	n/a
Share B2X (revenue/volume)	n/a
Parcel & express items per capita	5
Share C2X (revenue/volume)	n/a
Share B2X (revenue/volume)	n/a



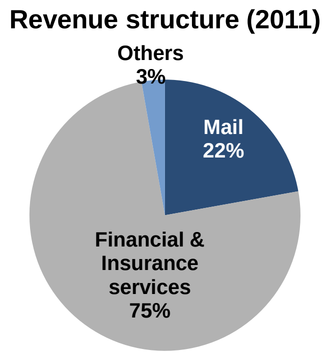
	Volume	Main developments since 2007
Domestic and inbound cross-border letter post	4,405m	Average growth rate 2007-2011: -6.0%
Outbound cross-border letter post	76.87m	Average growth rate 2007-2011: -0.4% Note: (USP data)
Domestic parcel & express	303m	Note: (2010)
Outbound cross-border parcel & express	n/a	

C.2 Market structure and key market players

	TOP3 Market share	Perceived competition	Key players
Domestic letter post	90%	NRA: Marginal USP: Intense	Poste Italiane (90%) TNT Post Italy SailPost
Outbound cross-border letter post	n/a	NRA: n/a USP: Intense	Asendia IMX Spring / TNT
Domestic parcel & express (total)	55%	NRA: Intense USP: Intense	Estimated USP market share: <15%
B2C	n/a	NRA: Moderate USP: Intense	Poste Italiane S.p.A., DHL, TNT Express, UPS
B2B	n/a	NRA: n/a USP: Intense	Bartolini, TNT Express, UPS
Outbound cross-border parcel & express	n/a	NRA: n/a USP: Intense	DHL, DPD, TNT Express

C.3 Poste Italiane (2011)

Legal status	plc
State ownership	100%
Total revenue	EUR 21,693m
Share national revenue	100%
EBIT margin total / mail	7.6% / -5.5%
Employment, total (headcount / FTE)	n/a / 148,453
Share civil servants (headcount)	n/a
Share part-time	n/a
Share wage costs on total costs	29.4%

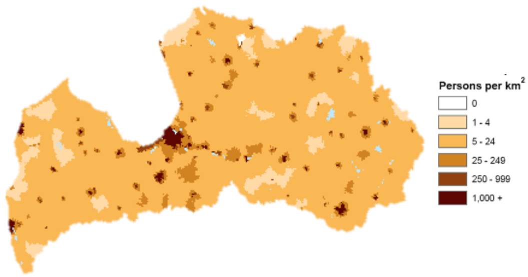


LATVIA

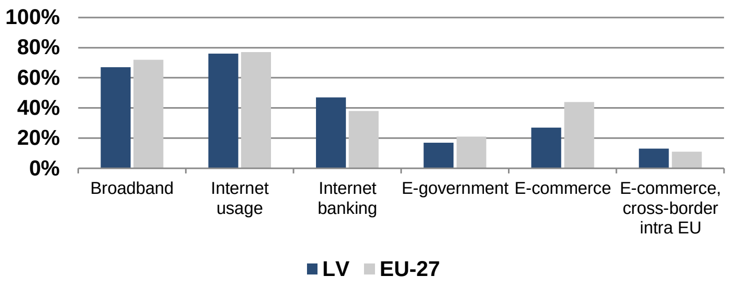
A. Country facts

Total population (2012)	2.0m
Population density (2012)	32 / sqkm
Urbanisation rate (2011)	68%
GDP growth rate (LV / EU-27)	2010: -0.9% 2011: 5.5% 2012: 5.6%
GDP per capita in PPS (2011) (in % EU-27 average)	14,700 (58%)
Transparency International CPI 2012 Score (Max. 100)	49

Latvia



ICT indicators (2012)



Online purchase per capita	n.a.	Average growth rate (2007-2011): n.a.

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	Ministry of Transport
Ministry for ownership of PPO	---
National regulatory authority	Public Utilities Commission

B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 5	Appointed by: Parliament
NRA resources, 2012	Budget:	Professional staff: 7
NRA authority to levy fines	Yes	NA
NRA authority to order remedies	Yes	
NRA right to data from USP	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	
NRA right to data from non-USPs	Compliance data: ---; Statistics: Yes for all postal services	

B.3 National Competition Autority			
National competition authority	The Competition Council		
Primary authority for competition rules	Both NRA and NCA equally		
NRA/NCA cooperation	Share data: Yes	Regular consult: No	Coord agmt: Yes
NCA decisions since 2009			
State aid cases			

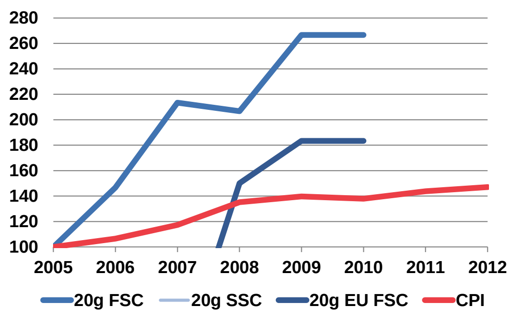
B.4 Scope of Universal Service			
Service	**Ensured**	**Price regulated**	**Service standards**
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	Yes	Yes	Yes
Bulk advertisements	No	No	No
Newspapers, magazines, etc.	Yes	No	No
Non-priority correspondence	Yes	Yes	Yes
Single piece parcels	Yes	Yes	Yes
Bulk parcels	No	No	No
Delivery frequency for LP	5 days per week		
Delivery frequency for parcels	5 days per week	Delivery point: Parcels required only to be held at postal outlet nearest addressee	

B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: All cross-border services	Second agency: ---	
EU v. UPU law, intra-EU	UPU provisions apply even if contrary to EU law		
EU v. UPU law, extra-EU	UPU provisions apply even if contrary to EU law		
Enforcement of Art. 13	Cost based TDs: Yes	Related to QoS: Yes	Transparent: Yes
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	Yes		
NRA prohibits discrimination between inbound mail from different EU mailers?	1	TD regimes: 2008 UPU new target system;	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	Yes	TD regimes: 2008 UPU new target system;	
Overalll net gain/ loss due to TDs not aligned to domestic postage	Moderate net loss compared to current outbound revenue		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): ---	Volume (%) : ---	
Choice between market forces, designation, and procurement	Study: No	National USP appointed by legislation: Yes	
Method of ensuring US	Mkt force (%): ---	Designation (%): 85	Procurement (%): ---
Households not receiving US	Letter post (% pop): 1	Parcels (% pop): 1	
Net cost of US0 in 2012	Pct USP exp: ---	Net cost study: No	
USO financed from public funds	No		
USO financed from compensation fund	Authorized: Yes	Established: No	

B.7 Universal service indicators

Price trend	**2010**	**2013**
20g FSC, domestic	EUR 0.56	EUR 0.58
20g SSC, domestic		
20g FSC, EU	EUR 0.78	EUR 0.79
5kg parcel, domestic		
5kg parcel, cross-border (lowest tariff)		



Quality of service	**2010**	**2012**	**USP customer satisfaction index**
Domestic target (D+1)	97%	97% (2011)	
Performance (D+1)	90%	86.9% (2011)	
Postal outlets (total)		571 (2011)	
Postal outlets per 10,000 inhabitants		2.75 (2011)	
Share post offices		97.9% (2011)	

B.8 Legal Treatment of Competitive Services

Special tariffs are transparent and non-discriminatory?	Bulk letters: ---	Direct mail: ---	Bulk parcels: ---
Special tariffs are available to other postal operators?	Bulk letters: ---	Direct mail: ---	Bulk parcels: ---
Licence required within US area	No authorisation required for provision of services with the universal service area		
Use of potentially restrictive authorisation conditions	Univ. servs: No	Quality conditions: No	Competence: No
Access to postal infrastructure by competitors	Addr. database: No	Post office boxes: Yes	Delivery boxes: No
VAT: USP services exempt	Single piece letters; single piece parcels; direct mail; newspapers/periodicals; outbound letter post; outbound parcel post;		
Customs: USP services subject to UPU customs rules	Inbound letters and large envelopes; inbound small packets; inbound parcels (UPU inward land rates); inbound parcels (non-UPU charges); inbound express mail items;		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: No answer	USP accepts inbound mail from EU/EEA ETOEs?: No answer	
Intra-EU remail restrictions	ABA remail: No	ABC remail: No	
Labour law: special rules in postal sector	No		

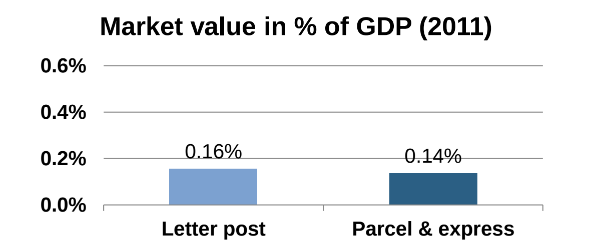
B.9 Protections of Users

Protection of users by law	Yes	Postal laws and/or regulations include user protection provisions.
Implementing authority(ies)	Postal NRA enforces user protection provisions for postal services	
Users of private operators covered	Within US: Yes	Outside US: Yes
Publication of annual statistics	By USP: No	By NRA: Yes
User complaints to USP reviewed, 2012	Percent of complaints (%): 0	

C. Market facts

C.1 Market size and demand (2011)

Letter post items per capita (EU-27 average)	19 (164)	
Share C2X (revenue/volume)	n/a	
Share B2X (revenue/volume)	n/a	
Parcel & express items per capita	2	
Share C2X (revenue/volume)	n/a	
Share B2X (revenue/volume)	n/a	
	Volume	**Main developments since 2007**
Domestic and inbound cross-border letter post	40m	Average growth rate 2007-2011: -9.3%
Outbound cross-border letter post	2.56m	Average growth rate 2007-2011: -12.4% Note: (USP data)
Domestic parcel & express	3.8m	
Outbound cross-border parcel & express	n/a	



C.2 Market structure and key market players

	TOP3 Market share	**Perceived competition**	**Key players**
Domestic letter post	n/a	NRA: Low USP: n/a	Latvijas Pasts Post Service Diena
Outbound cross-border letter post	n/a	NRA: Low USP: n/a	Latvijas Pasts
Domestic parcel & express (total)	n/a	NRA: Substantial USP: n/a	Estimated USP market share: 20-25%
B2C	n/a	NRA: n/a USP: n/a	n/a
B2B	n/a	NRA: n/a USP: n/a	n/a
Outbound cross-border parcel & express	n/a	NRA: n/a USP: n/a	Itella Logistics, Latvijas Post

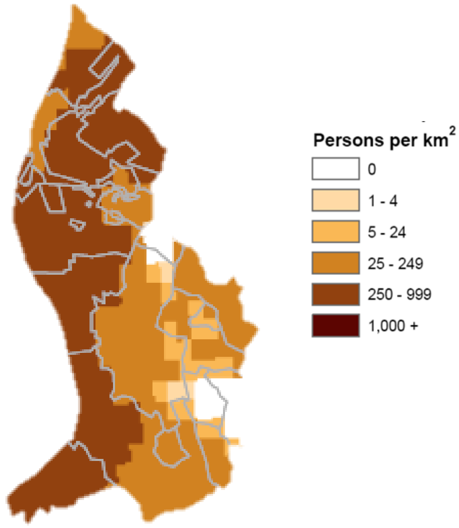
C.3 Latvijas Pasts (2010)

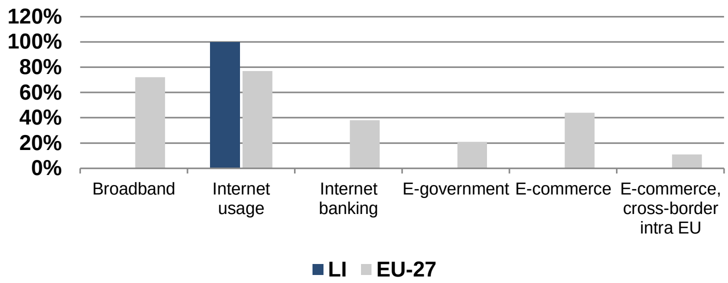
Legal status	plc	No segment information
State ownership	100%	
Total revenue	EUR 54m	
Share national revenue	n/a	
EBIT margin total / mail	7.9% / n/a	
Employment, total (headcount / FTE)	5,006 / n/a	
Share civil servants (headcount)	n/a	
Share part-time	n/a	
Share wage costs on total costs	55.2%	

LIECHTENSTEIN

A. Country facts

		Liechtenstein
Total population (2012)	0.04m	
Population density (2012)	227 / sqkm	
Urbanisation rate (2011)	14%	
GDP growth rate (LI / EU-27)	n.a.	
GDP per capita in PPS (2011) (in % EU-27 average)	n.a.	
Transparency International CPI 2012 Score (Max. 100)	n.a.	
ICT indicators (2012)		
Online purchase per capita	n.a.	Average growth rate (2007-2011): n.a.





B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	---
Ministry for ownership of PPO	---
National regulatory authority	---

B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: ---	Appointed by: ---
NRA resources, 2012	Budget:	Professional staff: ---
NRA authority to levy fines	No	n/a
NRA authority to order remedies	---	
NRA right to data from USP	Compliance data: ---; Statistics: ---	
NRA right to data from non-USPs	Compliance data: ---; Statistics: ---	

B.3 National Competition Autority			
National competition authority			
Primary authority for competition rules	---		
NRA/NCA cooperation	Share data: ---	Regular consult: ---	Coord agmt: ---
NCA decisions since 2009			
State aid cases			

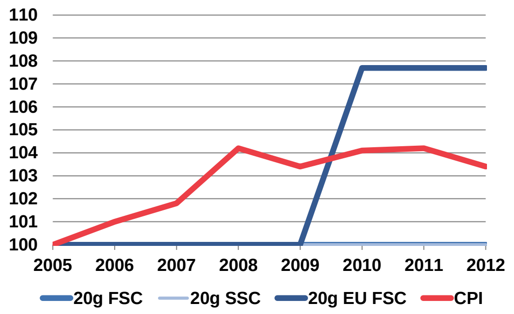
B.4 Scope of Universal Service			
Service	**Ensured**	**Price regulated**	**Service standards**
Single piece letter post (FSC)	No	---	---
Bulk letters	Yes	---	---
Bulk advertisements	No	---	---
Newspapers, magazines, etc.	No	---	---
Non-priority correspondence	---	---	---
Single piece parcels	No	---	---
Bulk parcels	Yes	---	---
Delivery frequency for LP	5 days per week		
Delivery frequency for parcels	---	Delivery point: ---	

B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: ---	Second agency: ---	
EU v. UPU law, intra-EU	---		
EU v. UPU law, extra-EU	---		
Enforcement of Art. 13	Cost based TDs: ---	Related to QoS: ---	Transparent: ---
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	---		
NRA prohibits discrimination between inbound mail from different EU mailers?	---	TD regimes: ---	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	---	TD regimes: ---	
Overalll net gain/ loss due to TDs not aligned to domestic postage	---		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): ---	Volume (%) : ---	
Choice between market forces, designation, and procurement	Study: ---	National USP appointed by legislation: ---	
Method of ensuring US	Mkt force (%): ---	Designation (%): ---	Procurement (%): ---
Households not receiving US	Letter post (% pop): ---	Parcels (% pop): ---	
Net cost of US0 in 2012	Pct USP exp: ---	Net cost study: ---	
USO financed from public funds	---		
USO financed from compensation fund	Authorized: ---	Established: ---	

B.7 Universal service indicators

Price trend	2010	2013
20g FSC, domestic	EUR 0.72	EUR 0.83
20g SSC, domestic	EUR 0.62	EUR 0.70
20g FSC, EU	EUR 1.01	EUR 1.16
5kg parcel, domestic	EUR 6.52	EUR 7.44
5kg parcel, cross-border (lowest tariff)	EUR 32.60	EUR 37.22



Quality of service	2010	2012	USP customer satisfaction index
Domestic target (D+1)			
Performance (D+1)			
Postal outlets (total)			
Postal outlets per 10,000 inhabitants			
Share post offices			

B.8 Legal Treatment of Competitive Services

Special tariffs are transparent and non-discriminatory?	Bulk letters: ---	Direct mail: ---	Bulk parcels: ---
Special tariffs are available to other postal operators?	Bulk letters: ---	Direct mail: ---	Bulk parcels: ---
Licence required within US area	---		
Use of potentially restrictive authorisation conditions	Univ. servs: ---	Quality conditions: ---	Competence: ---
Access to postal infrastructure by competitors	Addr. database: No	Post office boxes: No	Delivery boxes: No
VAT: USP services exempt	---		
Customs: USP services subject to UPU customs rules	---		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: ---	USP accepts inbound mail from EU/EEA ETOEs?: ---	
Intra-EU remail restrictions	ABA remail: ---	ABC remail: ---	
Labour law: special rules in postal sector	---		

B.9 Protections of Users

Protection of users by law	---	---
Implementing authority(ies)	---	
Users of private operators covered	Within US: ---	Outside US: Yes
Publication of annual statistics	By USP: ---	By NRA: No
User complaints to USP reviewed, 2012	Percent of complaints (%): ---	

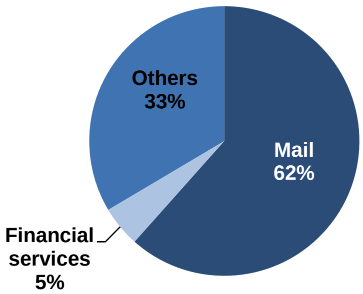
C. Market facts

C.1 Market size and demand (2011)		
Letter post items per capita (EU-27 average)	645 (164)	No information available
Share C2X (revenue/volume)	n/a	
Share B2X (revenue/volume)	n/a	
Parcel & express items per capita	n/a	
Share C2X (revenue/volume)	n/a	
Share B2X (revenue/volume)	n/a	
	Volume	**Main developments since 2007**
Domestic and inbound cross-border letter post	23 m	Average growth rate 2007-2011: n/a
Outbound cross-border letter post	10.2m	Average growth rate 2007-2011: n/a Note: (USP data)
Domestic parcel & express	n/a	
Outbound cross-border parcel & express	n/a	

C.2 Market structure and key market players			
	TOP3 Market share	**Perceived competition**	**Key players**
Domestic letter post	n/a	NRA: n/a USP: n/a	n/a
Outbound cross-border letter post	n/a	NRA: n/a USP: n/a	n/a
Domestic parcel & express (total)	n/a	NRA: n/a USP: n/a	Estimated USP market share: n/a
B2C	n/a	NRA: n/a USP: n/a	n/a
B2B	n/a	NRA: n/a USP: n/a	n/a
Outbound cross-border parcel & express	n/a	NRA: n/a USP: n/a	n/a

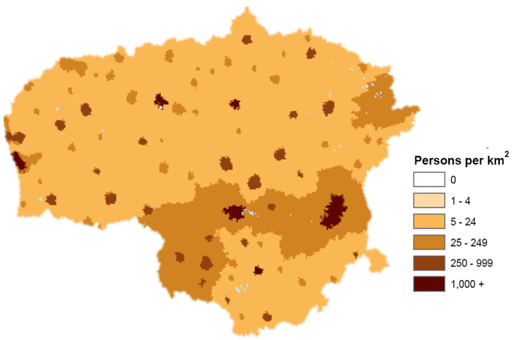
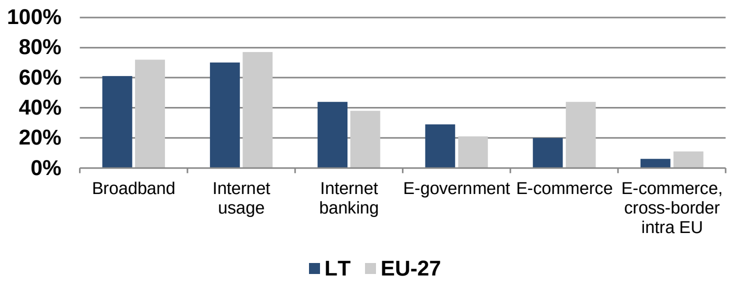
C.3 Liechtensteinische Post (2011)	
Legal status	plc
State ownership	75% 25% Schweizerische Post
Total revenue	EUR 40m
Share national revenue	n/a
EBIT margin total / mail	2.6% / n/a
Employment, total (headcount / FTE)	324 / n/a
Share civil servants (headcount)	n/a
Share part-time	n/a
Share wage costs on total costs	43%

Revenue structure (2011)



LITHUANIA

A. Country facts

		Lithuania
Total population (2012)	3.0m	
Population density (2012)	46 / sqkm	
Urbanisation rate (2011)	67%	
GDP growth rate (LT / EU-27)	2010: 1.5% 2011: 5.9% 2012: 3.6%	
GDP per capita in PPS (2011) (in % EU-27 average)	16,600 (66%)	
Transparency International CPI 2012 Score (Max. 100)	54	
ICT indicators (2012)		
Online purchase per capita	n.a.	Average growth rate (2007-2011): n.a.

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	Ministry of Transport and Communications of Lithuania
Ministry for ownership of PPO	---
National regulatory authority	Communications Regulatory Authority of the Republic of Lithuania

B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 7	Appointed by: Other
NRA resources, 2012	Budget:	Professional staff: 5
NRA authority to levy fines	Yes	Limit: 145213,75464684
NRA authority to order remedies	Yes	
NRA right to data from USP	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	
NRA right to data from non-USPs	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	

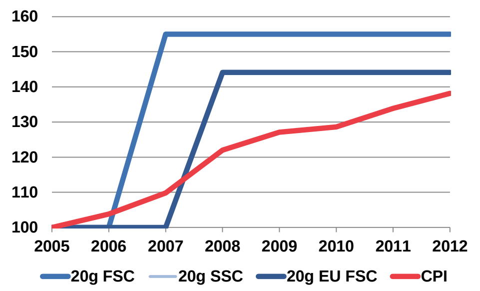
B.3 National Competition Autority			
National competition authority	Competition Council of the Republic of Lithuania		
Primary authority for competition rules	National competition authority (NCA)		
NRA/NCA cooperation	Share data: Yes	Regular consult: Yes	Coord agmt: No
NCA decisions since 2009			
State aid cases			

B.4 Scope of Universal Service			
Service	**Ensured**	**Price regulated**	**Service standards**
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	No	---	---
Bulk advertisements	No	No	No
Newspapers, magazines, etc.	No	---	---
Non-priority correspondence	Yes	Yes	No
Single piece parcels	Yes	Yes	No
Bulk parcels	No	---	---
Delivery frequency for LP	5 days per week		
Delivery frequency for parcels	5 days per week	Delivery point: Parcels must be delivered without charge to addressee	

B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: All cross-border services	Second agency: ---	
EU v. UPU law, intra-EU	EU law apply even if contrary to UPU provisions		
EU v. UPU law, extra-EU	EU law apply even if contrary to UPU provisions		
Enforcement of Art. 13	Cost based TDs: Yes	Related to QoS: Yes	Transparent: Unknown, no information
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	Unknown, no information		
NRA prohibits discrimination between inbound mail from different EU mailers?	3	TD regimes: 2008 UPU transitional system; Reims TDs; bilateral TD agreements;	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	Yes	TD regimes: 2008 UPU transitional system; Reims TDs;	
Overalll net gain/ loss due to TDs not aligned to domestic postage	No answer		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): ---	Volume (%) : 10	
Choice between market forces, designation, and procurement	Study: Unknown, no information	National USP appointed by legislation: Yes	
Method of ensuring US	Mkt force (%): ---	Designation (%): 100	Procurement (%): ---
Households not receiving US	Letter post (% pop): 0	Parcels (% pop): 0	
Net cost of US0 in 2012	Pct USP exp: ---	Net cost study: No	
USO financed from public funds	No		
USO financed from compensation fund	Authorized: No	Established: No	

B.7 Universal service indicators		
Price trend	**2010**	**2013**
20g FSC, domestic	EUR 0.45	EUR 0.45
20g SSC, domestic	EUR 0.39	EUR 0.39
20g FSC, EU	EUR 0.71	EUR 0.71
5kg parcel, domestic	EUR 3.13	EUR 3.13
5kg parcel, cross-border (lowest tariff)	EUR 13.74	EUR 13.74



Quality of service	**2010**	**2012**	**USP customer satisfaction index**
Domestic target (D+1)	85%	85%	
Performance (D+1)	74.3%	75.6% (2011)	
Postal outlets (total)	872	836	
Postal outlets per 10,000 inhabitants	2.62	2.78	
Share post offices	100%	100%	

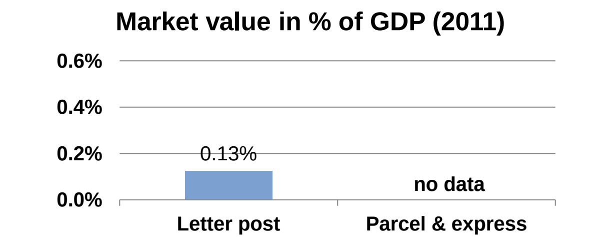
B.8 Legal Treatment of Competitive Services			
Special tariffs are transparent and non-discriminatory?	Bulk letters: Required by law and verified in practice	Direct mail: Required by law and verified in practice	Bulk parcels: Required by law and verified in practice
Special tariffs are available to other postal operators?	Bulk letters: Required by law and verified in practice	Direct mail: Required by law and verified in practice	Bulk parcels: Required by law and verified in practice
Licence required within US area	General authorisation required for provision of some services with the universal service area		
Use of potentially restrictive authorisation conditions	Univ. servs: Yes	Quality conditions: No	Competence: No
Access to postal infrastructure by competitors	Addr. database: Yes	Post office boxes: Yes	Delivery boxes: Yes
VAT: USP services exempt	Single piece letters; single piece parcels; direct mail; bulk parcels; outbound letter post; outbound parcel post;		
Customs: USP services subject to UPU customs rules	other;		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: Unknown, no information	USP accepts inbound mail from EU/EEA ETOEs?: Unknown, no information	
Intra-EU remail restrictions	ABA remail: Unknown, no information	ABC remail: Unknown, no information	
Labour law: special rules in postal sector	No		

B.9 Protections of Users		
Protection of users by law	Yes	Postal laws and/or regulations include user protection provisions.
Implementing authority(ies)	Postal NRA enforces user protection provisions for postal services	
Users of private operators covered	Within US: Yes	Outside US: Yes
Publication of annual statistics	By USP: Yes	By NRA: ---
User complaints to USP reviewed, 2012	Percent of complaints (%): 24	

C. Market facts

C.1 Market size and demand (2011)

Letter post items per capita (EU-27 average)	25 (164)
Share C2X (revenue/volume)	14% (Volume)
Share B2X (revenue/volume)	86% (Volume)
Parcel & express items per capita	2
Share C2X (revenue/volume)	n/a
Share B2X (revenue/volume)	n/a



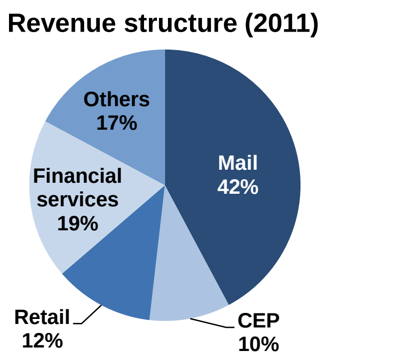
	Volume	Main developments since 2007
Domestic and inbound cross-border letter post	77m	Average growth rate 2007-2011: -8.3%
Outbound cross-border letter post	3.67m	Average growth rate 2007-2011: -5.5% Note: (USP data)
Domestic parcel & express	7.53m	Note: (USP 2012)
Outbound cross-border parcel & express	n/a	

C.2 Market structure and key market players

	TOP3 Market share	Perceived competition	Key players
Domestic letter post	n/a	NRA: Low USP: Substantial	AB Lithuanian Post (93%) UAB Vilpostus UAB Greitasis kurjeris
Outbound cross-border letter post	n/a	NRA: Low USP: Marginal	AB Lithuanian Post UAB DPD Lietuva UAB DHL Lietuva
Domestic parcel & express (total)	66%	NRA: Substantial USP: Intense	Estimated USP market share: <10%
B2C	n/a	NRA: Substantial USP: Intense	AB Lithuanian Post, DPD Latvia, UAB Venipak LT
B2B	n/a	NRA: n/a USP: Substantial	DPD Lietuva, Unipakas, Venipak LT
Outbound cross-border parcel & express	n/a	NRA: Moderate USP: Substantial	AB Lithuanian Post, TNT Express, UAB DPD Lietuva

C.3 AB Lithuanian Post (2011)

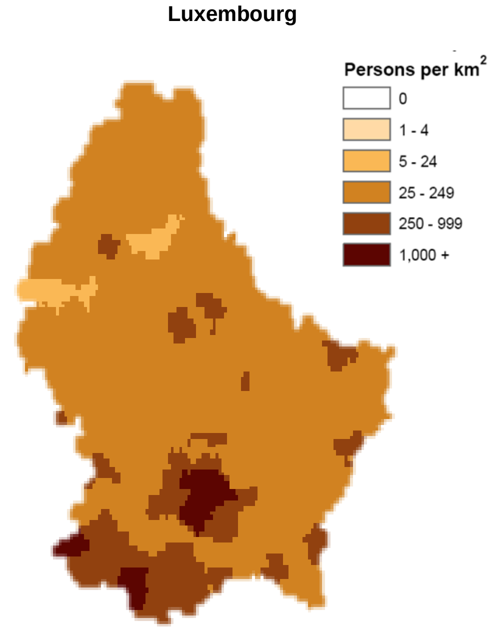
Legal status	plc
State ownership	100%
Total revenue	EUR 53m
Share national revenue	100%
EBIT margin total / mail	1.2% / n/a
Employment, total (headcount / FTE)	6,257 / 4,916 (2012)
Share civil servants (headcount)	0% (2012)
Share part-time	61.4% (2012)
Share wage costs on total costs	63.2%



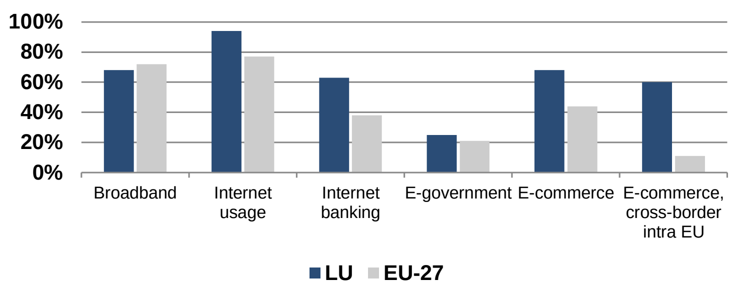
LUXEMBOURG

A. Country facts

Total population (2012)	0.5m
Population density (2012)	203 / sqkm
Urbanisation rate (2011)	85%
GDP growth rate (LU / EU-27)	2010: 2.9% 2011: 1.7% 2012: 0.2%
GDP per capita in PPS (2011) (in % EU-27 average)	68,100 (271%)
Transparency International CPI 2012 Score (Max. 100)	80



ICT indicators (2012)



Online purchase per capita	n.a.	Average growth rate (2007-2011): n.a.

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	Media and communications service (Service des Médias et des Communications)
Ministry for ownership of PPO	---
National regulatory authority	Luxembourg Institute for Regulation

B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 3	Appointed by: Other
NRA resources, 2012	Budget: 465279	Professional staff: 0
NRA authority to levy fines	Yes	Limit: 500000
NRA authority to order remedies	Yes	
NRA right to data from USP	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	
NRA right to data from non-USPs	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	

B.3 National Competition Autority			
National competition authority	Conseil de la Concurrence		
Primary authority for competition rules	National regulatory authority for postal affairs (NRA)		
NRA/NCA cooperation	Share data: No	Regular consult: No	Coord agmt: No
NCA decisions since 2009	2012-E-07 - Dintec/P&T		
State aid cases			

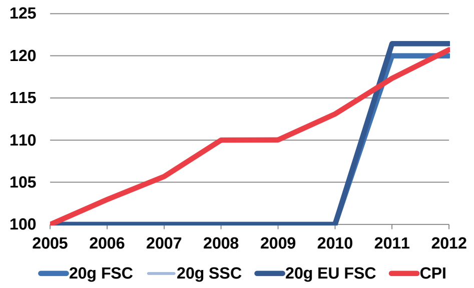
B.4 Scope of Universal Service			
Service	**Ensured**	**Price regulated**	**Service standards**
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	Yes	Yes	Yes
Bulk advertisements	No	No	No
Newspapers, magazines, etc.	No	Unknown, no information	---
Non-priority correspondence	No	---	---
Single piece parcels	Yes	Yes	Yes
Bulk parcels	Yes	Unknown, no information	No
Delivery frequency for LP	5 days per week		
Delivery frequency for parcels	5 days per week	Delivery point: Parcels must be delivered without charge to addressee	

B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: All cross-border services	Second agency: n/a	
EU v. UPU law, intra-EU	EU law apply even if contrary to UPU provisions		
EU v. UPU law, extra-EU	EU law apply even if contrary to UPU provisions		
Enforcement of Art. 13	Cost based TDs: Yes	Related to QoS: Yes	Transparent: No
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	No		
NRA prohibits discrimination between inbound mail from different EU mailers?	3	TD regimes: 2008 UPU new target system; Reims TDs; bilateral TD agreements;	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	No	TD regimes: 2008 UPU new target system; 2008 UPU transitional system; Reims TDs;	
Overalll net gain/ loss due to TDs not aligned to domestic postage	No significant gain or loss		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): ---	Volume (%) : ---	
Choice between market forces, designation, and procurement	Study: No	National USP appointed by legislation: Yes	
Method of ensuring US	Mkt force (%): ---	Designation (%): 80	Procurement (%): ---
Households not receiving US	Letter post (% pop): 1	Parcels (% pop): 1	
Net cost of USO in 2012	Pct USP exp: ---	Net cost study: No	
USO financed from public funds	No		
USO financed from compensation fund	Authorized: Yes	Established: No	

B.7 Universal service indicators

Price trend	2010	2013
20g FSC, domestic	EUR 0.50	EUR 0.60
20g SSC, domestic		
20g FSC, EU	EUR 0.70	EUR 0.85
5kg parcel, domestic	EUR 6.50	EUR 8.00
5kg parcel, cross-border (lowest tariff)	EUR 10.55	EUR 14.00



Quality of service	2010	2012	USP customer satisfaction index
Domestic target (D+1)	95%	95%	2011: 97%
Performance (D+1)	98%	98.4%	
Postal outlets (total)	116	116	
Postal outlets per 10,000 inhabitants	2.31	2.21	
Share post offices	85.3%	83.6%	

B.8 Legal Treatment of Competitive Services

Special tariffs are transparent and non-discriminatory?	Bulk letters: Required by law but not verified in practice	Direct mail: Required by law but not verified in practice	Bulk parcels: Required by law but not verified in practice
Special tariffs are available to other postal operators?	Bulk letters: Required by law but not verified in practice	Direct mail: Required by law but not verified in practice	Bulk parcels: Required by law but not verified in practice
Licence required within US area	Licence required for provision of some services with the universal service area		
Use of potentially restrictive authorisation conditions	Univ. servs: No	Quality conditions: No	Competence: Yes
Access to postal infrastructure by competitors	Addr. database: Yes	Post office boxes: Yes	Delivery boxes: Yes
VAT: USP services exempt	Single piece letters; single piece parcels; direct mail; newspapers/periodicals; bulk parcels; outbound letter post; outbound parcel post; other;		
Customs: USP services subject to UPU customs rules	other;		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: No	USP accepts inbound mail from EU/EEA ETOEs?: No	
Intra-EU remail restrictions	ABA remail: No	ABC remail: No	
Labour law: special rules in postal sector	No		

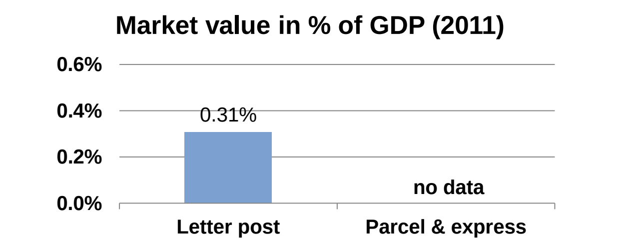
B.9 Protections of Users

Protection of users by law	Yes	Postal laws and/or regulations include user protection provisions.
Implementing authority(ies)	Postal NRA enforces user protection provisions for postal services	
Users of private operators covered	Within US: Yes	Outside US: Yes
Publication of annual statistics	By USP: Yes	By NRA: No
User complaints to USP reviewed, 2012	Percent of complaints (%): 1	

C. Market facts

C.1 Market size and demand (2011)

Letter post items per capita (EU-27 average)	347 (164)
Share C2X (revenue/volume)	n/a
Share B2X (revenue/volume)	n/a
Parcel & express items per capita	n/a
Share C2X (revenue/volume)	n/a
Share B2X (revenue/volume)	n/a



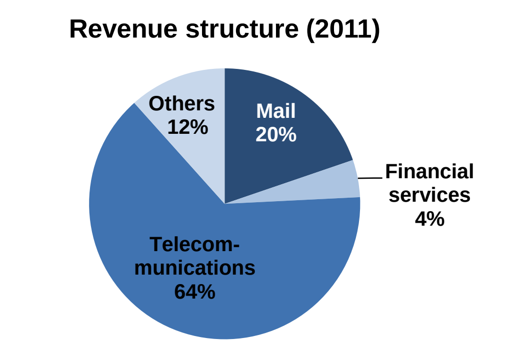
	Volume	Main developments since 2007
Domestic and inbound cross-border letter post	178m	Average growth rate 2007-2011: -0.7%
Outbound cross-border letter post	33.1m	Average growth rate 2007-2011: -1.3% Note: (USP data)
Domestic parcel & express	n/a	
Outbound cross-border parcel & express	n/a	

C.2 Market structure and key market players

	TOP3 Market share	Perceived competition	Key players
Domestic letter post	n/a	NRA: Moderate USP: Moderate	LUUSP
Outbound cross-border letter post	n/a	NRA: Substantial USP: Substantial	n/a
Domestic parcel & express (total)	n/a	NRA: Intense USP: Intense	Estimated USP market share: n/a
B2C	n/a	NRA: Intense USP: Intense	n/a
B2B	n/a	NRA: Intense USP: Intense	n/a
Outbound cross-border parcel & express	n/a	NRA: Intense USP: Intense	n/a

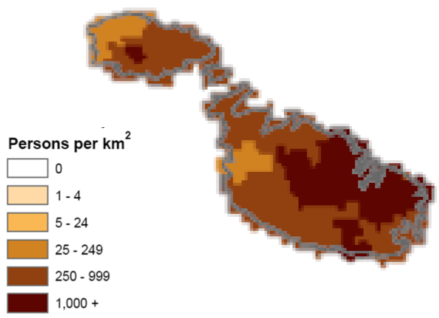
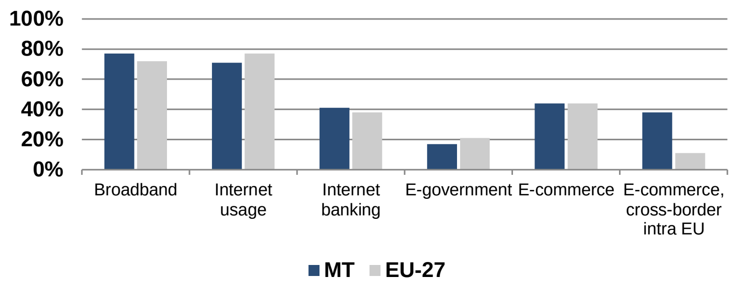
C.3 P&T Luxembourg (2011)

Legal status	State enterprise
State ownership	100%
Total revenue	EUR 664m
Share national revenue	94%
EBIT margin total / mail	n/a / n/a
Employment, total (headcount / FTE)	3,676 / n/a
Share civil servants (headcount)	49.8%
Share part-time	n/a
Share wage costs on total costs	31.7%



MALTA

A. Country facts

Total population (2012)	0.4m	**Malta** 
Population density (2012)	1321 / sqkm	
Urbanisation rate (2011)	95%	
GDP growth rate (MT / EU-27)	2010: 2.9% 2011: 1.7% 2012: 0.8%	
GDP per capita in PPS (2011) (in % EU-27 average)	21,500 (86%)	
Transparency International CPI 2012 Score (Max. 100)	57	
ICT indicators (2012)		
Online purchase per capita	n.a.	Average growth rate (2007-2011): n.a.

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	The Minister for the Economy, Investment and Small Business.
Ministry for ownership of PPO	---
National regulatory authority	Malta Communications Authority

B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 5	Appointed by: Postal Minister or ministry staff
NRA resources, 2012	Budget: 235620	Professional staff: 4
NRA authority to levy fines	Yes	Limit: 25000
NRA authority to order remedies	Yes	
NRA right to data from USP	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	
NRA right to data from non-USPs	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	

B.3 National Competition Autority			
National competition authority	Malta Competition and Consumer Affairs Authority		
Primary authority for competition rules	National competition authority (NCA)		
NRA/NCA cooperation	Share data: Yes	Regular consult: Yes	Coord agmt: No
NCA decisions since 2009			
State aid cases			

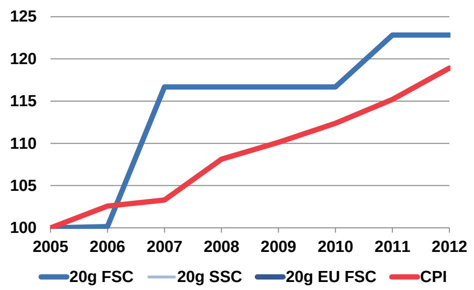
B.4 Scope of Universal Service			
Service	**Ensured**	**Price regulated**	**Service standards**
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	Yes	Yes	Yes
Bulk advertisements	Yes	Yes	Yes
Newspapers, magazines, etc.	Yes	Yes	Yes
Non-priority correspondence	No	---	---
Single piece parcels	Yes	Yes	Yes
Bulk parcels	Yes	Yes	Yes
Delivery frequency for LP	6 days per week		
Delivery frequency for parcels	6 days per week	Delivery point: Parcels must be delivered without charge to addressee	

B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: All cross-border services	Second agency: ---	
EU v. UPU law, intra-EU	EU law apply even if contrary to UPU provisions		
EU v. UPU law, extra-EU	EU law apply even if contrary to UPU provisions		
Enforcement of Art. 13	Cost based TDs: No answer	Related to QoS: No answer	Transparent: No
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	No answer		
NRA prohibits discrimination between inbound mail from different EU mailers?	---	TD regimes: 2008 UPU new target system; bilateral TD agreements;	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	Unknown, no information	TD regimes: 2008 UPU new target system; bilateral TD agreements;	
Overalll net gain/ loss due to TDs not aligned to domestic postage	No answer		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): ---	Volume (%) : ---	
Choice between market forces, designation, and procurement	Study: Yes	National USP appointed by legislation: Yes	
Method of ensuring US	Mkt force (%): ---	Designation (%): 99	Procurement (%): 0
Households not receiving US	Letter post (% pop): 0	Parcels (% pop): 0	
Net cost of US0 in 2012	Pct USP exp: ---	Net cost study: No	
USO financed from public funds	No		
USO financed from compensation fund	Authorized: Yes	Established: No	

B.7 Universal service indicators

Price trend	2010	2013
20g FSC, domestic	EUR 0.19	EUR 0.26
20g SSC, domestic		
20g FSC, EU	EUR 0.37	EUR 0.37
5kg parcel, domestic	EUR 2.33	EUR 2.33
5kg parcel, cross-border (lowest tariff)	EUR 14.26	EUR 14.26



Quality of service	2010	2012	USP customer satisfaction index
Domestic target (D+1)	93%	93%	
Performance (D+1)	95.1%	95.6%	
Postal outlets (total)	65	63	
Postal outlets per 10,000 inhabitants	1.57	1.51	
Share post offices	50.8%	52.4%	

B.8 Legal Treatment of Competitive Services

Special tariffs are transparent and non-discriminatory?	Bulk letters: Required by law but not verified in practice	Direct mail: Required by law but not verified in practice	Bulk parcels: Required by law but not verified in practice
Special tariffs are available to other postal operators?	Bulk letters: Required by law but not verified in practice	Direct mail: Required by law but not verified in practice	Bulk parcels: Required by law but not verified in practice
Licence required within US area	Licence required for provision of some services with the universal service area		
Use of potentially restrictive authorisation conditions	Univ. servs: No	Quality conditions: No	Competence: No
Access to postal infrastructure by competitors	Addr. database: No	Post office boxes: Yes	Delivery boxes: No
VAT: USP services exempt	Single piece letters; single piece parcels; direct mail; newspapers/periodicals; bulk parcels; outbound letter post; outbound parcel post;		
Customs: USP services subject to UPU customs rules	---		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: ---	USP accepts inbound mail from EU/EEA ETOEs?: ---	
Intra-EU remail restrictions	ABA remail: ---	ABC remail: ---	
Labour law: special rules in postal sector	No		

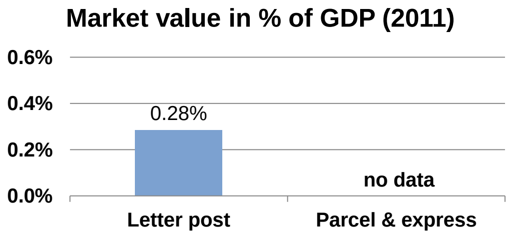
B.9 Protections of Users

Protection of users by law	Yes	Both postal and consumer protection laws apply to postal users.
Implementing authority(ies)	Both NRA and NCPA enforce user protection provisions for postal services	
Users of private operators covered	Within US: Yes	Outside US: Yes
Publication of annual statistics	By USP: Yes	By NRA: No
User complaints to USP reviewed, 2012	Percent of complaints (%): ---	

C. Market facts

C.1 Market size and demand (2011)

Letter post items per capita (EU-27 average)	93 (164)
Share C2X (revenue/volume)	n/a
Share B2X (revenue/volume)	n/a
Parcel & express items per capita	2
Share C2X (revenue/volume)	n/a
Share B2X (revenue/volume)	n/a



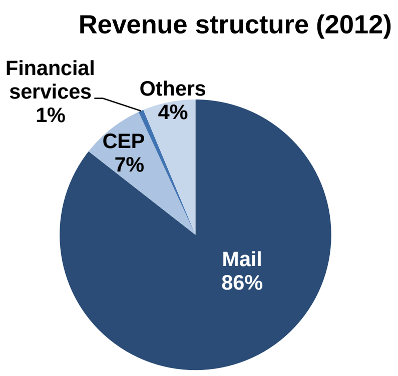
	Volume	**Main developments since 2007**
Domestic and inbound cross-border letter post	39m	Average growth rate 2007-2011: -6.4%
Outbound cross-border letter post	3.04m	Average growth rate 2007-2011: -9.8% Note: (USP data)
Domestic parcel & express	0.78m	Note: (2012)
Outbound cross-border parcel & express	n/a	

C.2 Market structure and key market players

	TOP3 Market share	**Perceived competition**	**Key players**
Domestic letter post	100%	NRA: Marginal USP: Low	MaltaPost Plc (99%) Premiere Post (Delivery of traffic summons via a registered mail type of service)
Outbound cross-border letter post	100%	NRA: Other USP: Low	MaltaPost
Domestic parcel & express (total)	66%	NRA: Substantial USP: Intense	Estimated USP market share: <20%
B2C	n/a	NRA: Substantial USP: Intense	n/a
B2B	n/a	NRA: Substantial USP: Intense	n/a
Outbound cross-border parcel & express	61%	NRA: Substantial USP: Intense	n/a

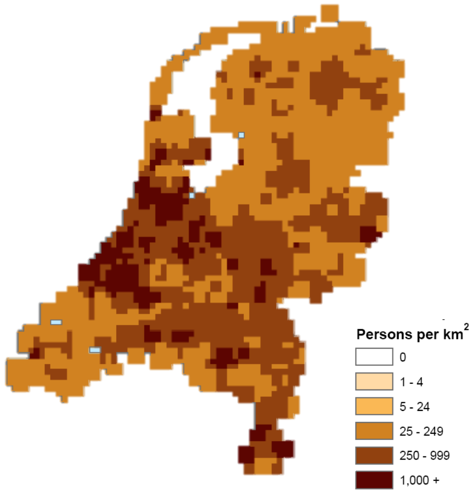
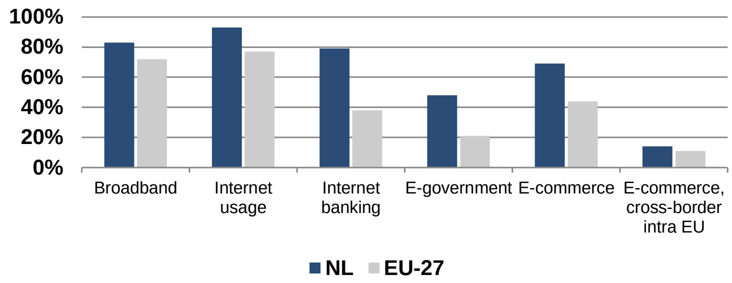
C.3 MaltaPost (2012)

Legal status	plc
State ownership	IPO 2008 67% (Redbox United) 33% free float
Total revenue	EUR 21m
Share national revenue	88%
EBIT margin total / mail	9.5% / 8.9%
Employment, total (headcount / FTE)	618 / 595
Share civil servants (headcount)	0%
Share part-time	22.3%
Share wage costs on total costs	54.6%



NETHERLANDS

A. Country facts

Total population (2012)	16.7m	**Netherlands** 
Population density (2012)	403 / sqkm	
Urbanisation rate (2011)	83%	
GDP growth rate (NL / EU-27)	2010: 1.6% 2011: 1.0% 2012: -0.9%	
GDP per capita in PPS (2011) (in % EU-27 average)	32,900 (131%)	
Transparency International CPI 2012 Score (Max. 100)	84	
ICT indicators (2012)		
Online purchase per capita	EUR 541	Average growth rate (2007-2011): 18%

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	Ministry of Economic Affairs
Ministry for ownership of PPO	---
National regulatory authority	Independent Post and Telecommunications Authority. From April 2nd onwards: The Netherlands Authority for Consumers & Markets.

B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 3	Appointed by: Postal Minister or ministry staff
NRA resources, 2012	Budget: 692000	Professional staff: ---
NRA authority to levy fines	Yes	Limit: 450000
NRA authority to order remedies	Unknown, no information	
NRA right to data from USP	Compliance data: Yes for all postal services; Statistics: Other	
NRA right to data from non-USPs	Compliance data: Yes for all postal services; Statistics: Other	

B.3 National Competition Autority			
National competition authority	The Netherlands Authority for Consumers and Markets		
Primary authority for competition rules	National competition authority (NCA)		
NRA/NCA cooperation	Share data: Yes	Regular consult: Yes	Coord agmt: Yes
NCA decisions since 2009	6207 - Sandd/ PostNL (ex TNT)		
State aid cases			

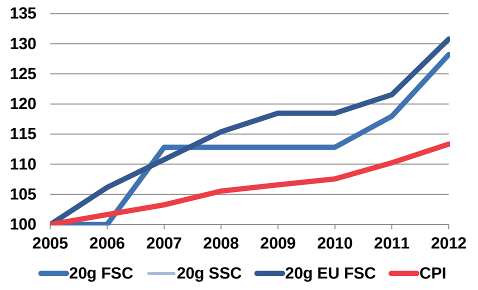
B.4 Scope of Universal Service			
Service	**Ensured**	**Price regulated**	**Service standards**
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	No	No	No
Bulk advertisements	No	No	No
Newspapers, magazines, etc.	No	No	No
Non-priority correspondence	No	No	No
Single piece parcels	Yes	Yes	No
Bulk parcels	No	No	No
Delivery frequency for LP	6 days per week		
Delivery frequency for parcels	No specific requirement	Delivery point: Other	

B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: Intra-EU cross-border services only	Second agency: ---	
EU v. UPU law, intra-EU	---		
EU v. UPU law, extra-EU	---		
Enforcement of Art. 13	Cost based TDs: Unknown, no information	Related to QoS: Unknown, no information	Transparent: No
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	Unknown, no information		
NRA prohibits discrimination between inbound mail from different EU mailers?	---	TD regimes: ---	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	Unknown, no information	TD regimes: ---	
Overalll net gain/ loss due to TDs not aligned to domestic postage	---		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): ---	Volume (%) : ---	
Choice between market forces, designation, and procurement	Study: Yes	National USP appointed by legislation: Yes	
Method of ensuring US	Mkt force (%): ---	Designation (%): 0	Procurement (%): ---
Households not receiving US	Letter post (% pop): 0	Parcels (% pop): 0	
Net cost of US0 in 2012	Pct USP exp: ---	Net cost study: No	
USO financed from public funds	No		
USO financed from compensation fund	Authorized: No	Established: No	

B.7 Universal service indicators

Price trend	2010	2013
20g FSC, domestic	EUR 0.44	EUR 0.54
20g SSC, domestic		
20g FSC, EU	EUR 0.77	EUR 0.90
5kg parcel, domestic	EUR 6.75	EUR 6.75
5kg parcel, cross-border (lowest tariff)	EUR 19.50	EUR 19.50



Quality of service	2010	2012	USP customer satisfaction index
Domestic target (D+1)	95%	95%	2010: 91% 2011: 89% 2012: 84%
Performance (D+1)	92,9%	93.9%	
Postal outlets (total)	2,196	2,205	
Postal outlets per 10,000 inhabitants	1.32	1.32	
Share post offices	0.2%	0.3%	

B.8 Legal Treatment of Competitive Services

Special tariffs are transparent and non-discriminatory?	Bulk letters: Required by law and verified in practice	Direct mail: Required by law and verified in practice	Bulk parcels: Required by law and verified in practice
Special tariffs are available to other postal operators?	Bulk letters: Required by law and verified in practice	Direct mail: Required by law and verified in practice	Bulk parcels: Required by law and verified in practice
Licence required within US area	No authorisation required for provision of services with the universal service area		
Use of potentially restrictive authorisation conditions	Univ. servs: ---	Quality conditions: ---	Competence: ---
Access to postal infrastructure by competitors	Addr. database: No	Post office boxes: Yes	Delivery boxes: No
VAT: USP services exempt	---		
Customs: USP services subject to UPU customs rules	other;		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: ---	USP accepts inbound mail from EU/EEA ETOEs?: ---	
Intra-EU remail restrictions	ABA remail: ---	ABC remail: ---	
Labour law: special rules in postal sector	Yes		

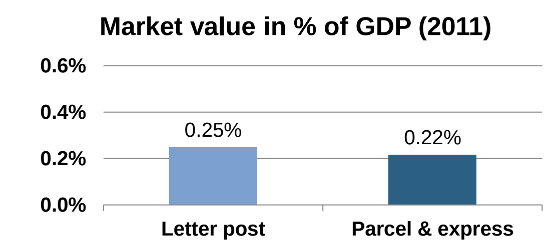
B.9 Protections of Users

Protection of users by law	Yes	Postal laws and/or regulations include user protection provisions.
Implementing authority(ies)	Postal NRA enforces user protection provisions for postal services	
Users of private operators covered	Within US: Yes	Outside US: Yes
Publication of annual statistics	By USP: No	By NRA: No
User complaints to USP reviewed, 2012	Percent of complaints (%): ---	

C. Market facts

C.1 Market size and demand (2011)

Letter post items per capita (EU-27 average)	269 (164)
Share C2X (revenue/volume)	8% (Volume)
Share B2X (revenue/volume)	92% (Volume)
Parcel & express items per capita	9
Share C2X (revenue/volume)	n/a
Share B2X (revenue/volume)	n/a



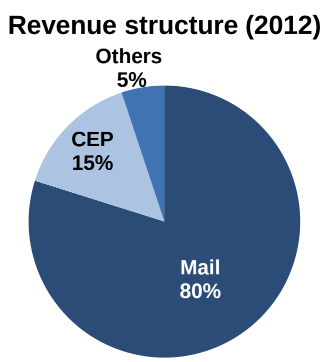
	Volume	Main developments since 2007
Domestic and inbound cross-border letter post	4,482m	Average growth rate 2007-2011: -5.4%
Outbound cross-border letter post	n/a	n/a
Domestic parcel & express	157m	Note: (2010)
Outbound cross-border parcel & express	n/a	

C.2 Market structure and key market players

	TOP3 Market share	Perceived competition	Key players
Domestic letter post	100%	NRA: Moderate USP: Substantial	PostNL Sandd
Outbound cross-border letter post	n/a	NRA: n/a USP: Substantial	PostNL Asendia BPI
Domestic parcel & express (total)	n/a	NRA: Substantial USP: Intense	Estimated USP market share: n/a
B2C	n/a	NRA: Moderate USP: Intense	PostNL (74%), DHL Selektvracht, TNT Express
B2B	n/a	NRA: Substantial USP: Substantial	PostNL (15%), DHL, DPD, GLS, TNT Express
Outbound cross-border parcel & express	n/a	NRA: n/a USP: Intense	DHL, DPD Eesti Ltd., UPS

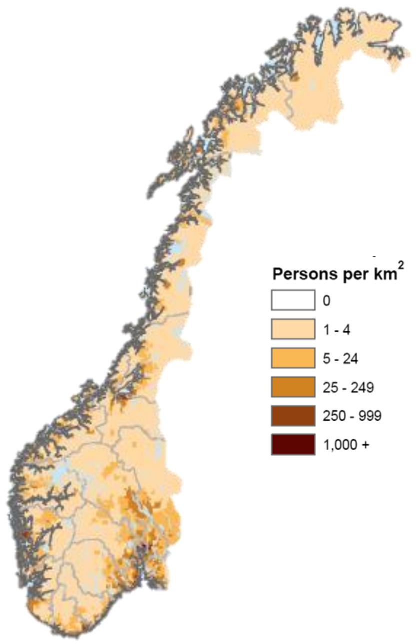
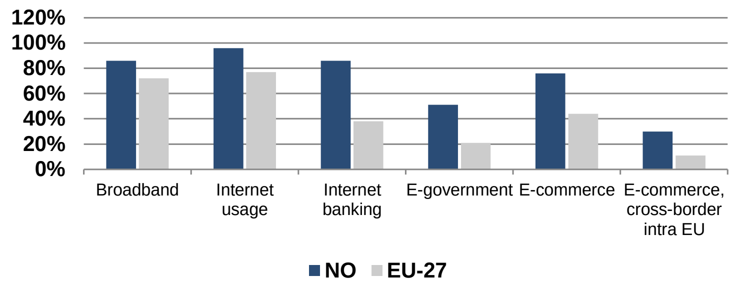
C.3 PostNL (2012)

Legal status	plc IPO 1996
State ownership	100% free float
Total revenue	EUR 4,276m
Share national revenue	63%
EBIT margin total / mail	6.8% / 1.2%
Employment, total (headcount / FTE)	66,411 / 33,824
Share civil servants (headcount)	0%
Share part-time	n/a
Share wage costs on total costs	31.8%



NORWAY

A. Country facts

		Norway
Total population (2012)	5.0m	
Population density (2012)	15 / sqkm	
Urbanisation rate (2011)	79%	
GDP growth rate (NO / EU-27)	2010: 0.5% 2011: 1.2% 2012: 3.2%	
GDP per capita in PPS (2011) (in % EU-27 average)	46,900 (187%)	
Transparency International CPI 2012 Score (Max. 100)	85	
ICT indicators (2012)		
Online purchase per capita	EUR 1,403	Average growth rate (2007-2011): 20%

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	Ministry of Transport and Communications
Ministry for ownership of PPO	---
National regulatory authority	Norwegian Post and Telecommunication Authority

B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 1	Appointed by: Postal Minister or ministry staff
NRA resources, 2012	Budget: 401268	Professional staff: 2.5
NRA authority to levy fines	No	n/a
NRA authority to order remedies	Unknown, no information	
NRA right to data from USP	Compliance data: Yes for all postal services; Statistics: Not for any postal services	
NRA right to data from non-USPs	Compliance data: Not for any postal services; Statistics: Not for any postal services	

B.3 National Competition Autority			
National competition authority	The Competition Authority		
Primary authority for competition rules	National competition authority (NCA)		
NRA/NCA cooperation	Share data: Yes	Regular consult: Yes	Coord agmt: Yes
NCA decisions since 2009	34 250 - Privpak/Posten Norge		
State aid cases			

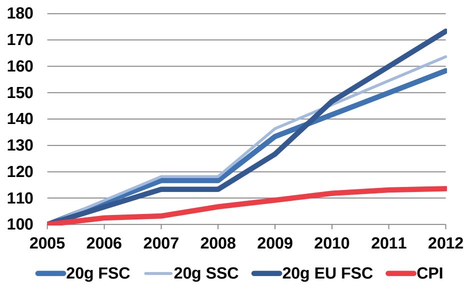
B.4 Scope of Universal Service			
Service	**Ensured**	**Price regulated**	**Service standards**
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	Yes	Yes	Yes
Bulk advertisements	No	Yes	Yes
Newspapers, magazines, etc.	No	Yes	Yes
Non-priority correspondence	Yes	Yes	Yes
Single piece parcels	Yes	Yes	Yes
Bulk parcels	No	No	No
Delivery frequency for LP	6 days per week		
Delivery frequency for parcels	6 days per week	Delivery point: Parcels must be delivered without charge to addressee	

B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: All cross-border services	Second agency: ---	
EU v. UPU law, intra-EU	Other		
EU v. UPU law, extra-EU	---		
Enforcement of Art. 13	Cost based TDs: Yes	Related to QoS: Yes	Transparent: No
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	No answer		
NRA prohibits discrimination between inbound mail from different EU mailers?	---	TD regimes: 2008 UPU transitional system; Reims TDs; bilateral TD agreements;	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	No	TD regimes: 2008 UPU old target system; 2008 UPU new target system; 2008 UPU transitional system; Reims TDs;	
Overalll net gain/ loss due to TDs not aligned to domestic postage	No answer		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): 100	Volume (%) : ---	
Choice between market forces, designation, and procurement	Study: No	National USP appointed by legislation: Yes	
Method of ensuring US	Mkt force (%): ---	Designation (%): ---	Procurement (%): ---
Households not receiving US	Letter post (% pop): 1	Parcels (% pop): 1	
Net cost of US0 in 2012	Pct USP exp: 9	Net cost study: Yes	
USO financed from public funds	Yes		
USO financed from compensation fund	Authorized: No	Established: No	

B.7 Universal service indicators

Price trend	2010	2013
20g FSC, domestic	EUR 1.06	EUR 1.29
20g SSC, domestic	EUR 1.00	EUR 1.22
20g FSC, EU	EUR 1.37	EUR 1.77
5kg parcel, domestic	EUR 14.99	EUR 19.05
5kg parcel, cross-border (lowest tariff)	EUR 39.73	EUR 45.94



Quality of service	2010	2012	USP customer satisfaction index
Domestic target (D+1)	85%	85%	2010: 85%
Performance (D+1)	83.5%	85.3%	
Postal outlets (total)	1,434	1,407	
Postal outlets per 10,000 inhabitants	2.95	2.82	
Share post offices	12.5%	12.7%	

B.8 Legal Treatment of Competitive Services

Special tariffs are transparent and non-discriminatory?	Bulk letters: Required by law and verified in practice	Direct mail: Required by law but not verified in practice	Bulk parcels: ---
Special tariffs are available to other postal operators?	Bulk letters: Required by law and verified in practice	Direct mail: Required by law and verified in practice	Bulk parcels: ---
Licence required within US area	Licence required for provision of some services with the universal service area		
Use of potentially restrictive authorisation conditions	Univ. servs: Yes	Quality conditions: No	Competence: No
Access to postal infrastructure by competitors	Addr. database: No	Post office boxes: No	Delivery boxes: No
VAT: USP services exempt	---		
Customs: USP services subject to UPU customs rules	---		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: No	USP accepts inbound mail from EU/EEA ETOEs?: No	
Intra-EU remail restrictions	ABA remail: Yes	ABC remail: No	
Labour law: special rules in postal sector	No		

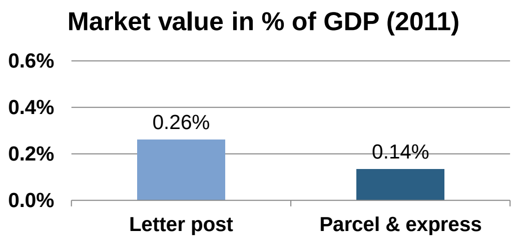
B.9 Protections of Users

Protection of users by law	Yes	Postal laws and/or regulations include user protection provisions.
Implementing authority(ies)	Postal NRA enforces user protection provisions for postal services	
Users of private operators covered	Within US: No	Outside US: No
Publication of annual statistics	By USP: No	By NRA: Yes
User complaints to USP reviewed, 2012	Percent of complaints (%): 80	

C. Market facts

C.1 Market size and demand (2011)

Letter post items per capita (EU-27 average)	274 (164)
Share C2X (revenue/volume)	4% (Volume)
Share B2X (revenue/volume)	96% (Volume)
Parcel & express items per capita	8
Share C2X (revenue/volume)	0% (Revenue)
Share B2X (revenue/volume)	100% (Revenue)



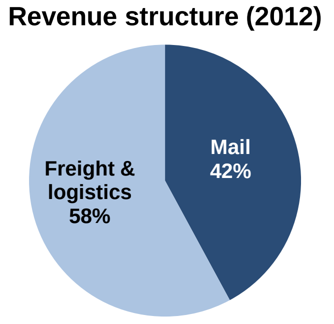
	Volume	Main developments since 2007
Domestic and inbound cross-border letter post	1,348m	Average growth rate 2007-2011: -5.5%
Outbound cross-border letter post	19.8m	Average growth rate 2007-2011: -13.4% Note: (USP data)
Domestic parcel & express	38.42m	
Outbound cross-border parcel & express	n/a	

C.2 Market structure and key market players

	TOP3 Market share	Perceived competition	Key players
Domestic letter post	100%	NRA: Marginal USP: Low	Posten (99.9%)
Outbound cross-border letter post	100%	NRA: Marginal USP: Substantial	Swiss Post (91.1%) PostNord DHL
Domestic parcel & express (total)	97%	NRA: Substantial USP: Intense	Estimated USP market share: >80%
B2C	n/a	NRA: Moderate USP: Intense	Posten Norge AS, DHL, Jetpak, Tollpost
B2B	n/a	NRA: Substantial USP: Substantial	NorwayPost / Bring, DHL, PostNord / Tollpost, TNT Express
Outbound cross-border parcel & express	99%	NRA: Substantial USP: Intense	DHL, PostNord, TNT Express, UPS

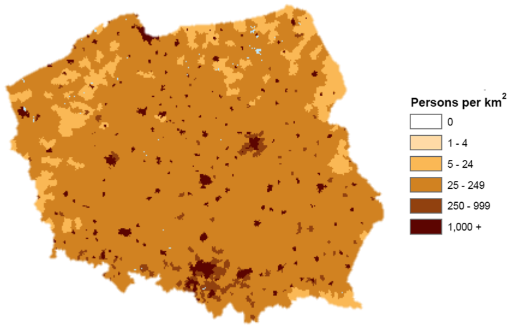
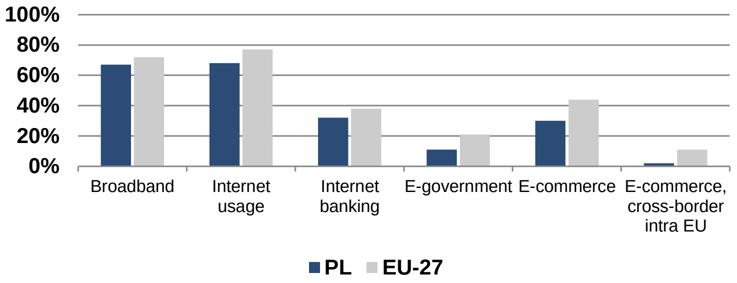
C.3 Posten (2012)

Legal status	plc
State ownership	100%
Total revenue	EUR 3,067m
Share national revenue	0%
EBIT margin total / mail	2.8% / 5.4%
Employment, total (headcount / FTE)	21,165 / 16,553
Share civil servants (headcount)	0%
Share part-time	27%
Share wage costs on total costs	42%



POLAND

A. Country facts

Total population (2012)	38.5m	**Poland** 
Population density (2012)	123 / sqkm	
Urbanisation rate (2011)	61%	
GDP growth rate (PL / EU-27)	2010: 3.9% 2011: 4.3% 2012: 2.0%	
GDP per capita in PPS (2011) (in % EU-27 average)	16,200 (64%)	
Transparency International CPI 2012 Score (Max. 100)	58	
ICT indicators (2012)	 	
Online purchase per capita	EUR 88	Average growth rate (2007-2011): 24%

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	Ministry of Administration and Digital Affairs of Poland.
Ministry for ownership of PPO	---
National regulatory authority	Office of Electronic Communications

B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 1	Appointed by: Council of Ministers or Prime Minister
NRA resources, 2012	Budget: 186254	Professional staff: 13
NRA authority to levy fines	Yes	n/a
NRA authority to order remedies	Yes	
NRA right to data from USP	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	
NRA right to data from non-USPs	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	

B.3 National Competition Autority			
National competition authority	Office of Competition and Consumer Protection		
Primary authority for competition rules	National regulatory authority for postal affairs (NRA)		
NRA/NCA cooperation	Share data: Yes	Regular consult: No	Coord agmt: No
NCA decisions since 2009			
State aid cases	N312/2010 - Compensation of costs incurred for the provision of services which are statutorily exempted from postage fees		

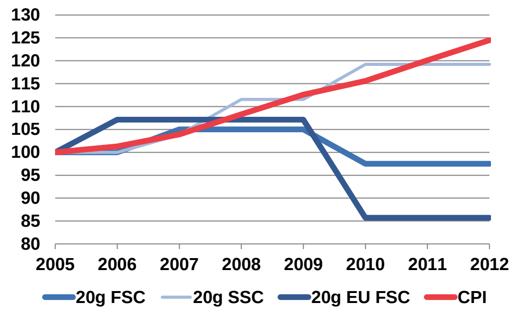
B.4 Scope of Universal Service			
Service	**Ensured**	**Price regulated**	**Service standards**
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	No	No	No
Bulk advertisements	No	No	No
Newspapers, magazines, etc.	No	No	No
Non-priority correspondence	Yes	Yes	Yes
Single piece parcels	Yes	Yes	Yes
Bulk parcels	No	No	No
Delivery frequency for LP	5 days per week		
Delivery frequency for parcels	5 days per week	Delivery point: Parcels must be delivered without charge to addressee	

B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: All cross-border services	Second agency: ---	
EU v. UPU law, intra-EU	EU law apply even if contrary to UPU provisions		
EU v. UPU law, extra-EU	UPU provisions apply except for EU competition and customs rules		
Enforcement of Art. 13	Cost based TDs: No answer	Related to QoS: No answer	Transparent: No answer
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	No answer		
NRA prohibits discrimination between inbound mail from different EU mailers?	4	TD regimes: 2008 UPU new target system; 2008 UPU transitional system; Reims TDs;	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	---	TD regimes: ---	
Overalll net gain/ loss due to TDs not aligned to domestic postage	---		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): ---	Volume (%) : ---	
Choice between market forces, designation, and procurement	Study: No	National USP appointed by legislation: Yes	
Method of ensuring US	Mkt force (%): 0	Designation (%): 100	Procurement (%): ---
Households not receiving US	Letter post (% pop): 0	Parcels (% pop): 0	
Net cost of US0 in 2012	Pct USP exp: ---	Net cost study: No	
USO financed from public funds	Yes		
USO financed from compensation fund	Authorized: Yes	Established: No	

B.7 Universal service indicators

Price trend	2010	2013
20g FSC, domestic	EUR 0.49	EUR 0.57
20g SSC, domestic	EUR 0.39	EUR 0.39
20g FSC, EU	EUR 0.60	EUR 1.12
5kg parcel, domestic	EUR 3.25	EUR 3.17
5kg parcel, cross-border (lowest tariff)	EUR 21.03	EUR 20.51



Quality of service	2010	2012	USP customer satisfaction index
Domestic target (D+1)	82%	82%	
Performance (D+1)	53.4%	63.4% (2011)	
Postal outlets (total)	8,383	8,459	
Postal outlets per 10,000 inhabitants	2.2	2.19	
Share post offices	61.7%	56.1%	

B.8 Legal Treatment of Competitive Services

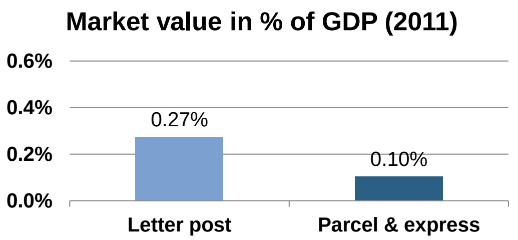
Special tariffs are transparent and non-discriminatory?	Bulk letters: Required by law but not verified in practice	Direct mail: Not required by law or verified in practice	Bulk parcels: Required by law but not verified in practice
Special tariffs are available to other postal operators?	Bulk letters: Not required by law or verified in practice	Direct mail: Not required by law or verified in practice	Bulk parcels: Required by law but not verified in practice
Licence required within US area	No authorisation required for provision of services with the universal service area		
Use of potentially restrictive authorisation conditions	Univ. servs: No	Quality conditions: Yes	Competence: Yes
Access to postal infrastructure by competitors	Addr. database: No	Post office boxes: Yes	Delivery boxes: Yes
VAT: USP services exempt	Single piece letters; single piece parcels; outbound letter post; outbound parcel post;		
Customs: USP services subject to UPU customs rules	Inbound letters and large envelopes; inbound small packets; inbound parcels (UPU inward land rates); inbound express mail items;		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: No	USP accepts inbound mail from EU/EEA ETOEs?: ---	
Intra-EU remail restrictions	ABA remail: Unknown, no information	ABC remail: Unknown, no information	
Labour law: special rules in postal sector	No		

B.9 Protections of Users

Protection of users by law	Yes	Postal laws and/or regulations include user protection provisions.
Implementing authority(ies)	Postal NRA enforces user protection provisions for postal services	
Users of private operators covered	Within US: No answer	Outside US: Yes
Publication of annual statistics	By USP: No	By NRA: Yes
User complaints to USP reviewed, 2012	Percent of complaints (%): ---	

C. Market facts

C.1 Market size and demand (2011)	
Letter post items per capita (EU-27 average)	50 (164)
Share C2X (revenue/volume)	23% (Volume)
Share B2X (revenue/volume)	77% (Volume)
Parcel & express items per capita	2
Share C2X (revenue/volume)	8% (Revenue)
Share B2X (revenue/volume)	92% (Revenue)



	Volume	Main developments since 2007
Domestic and inbound cross-border letter post	1,908m	Average growth rate 2007-2011: 0.7%
Outbound cross-border letter post	29.45m	Average growth rate 2007-2011: -3.5% Note: (USP data)
Domestic parcel & express	81.5m	
Outbound cross-border parcel & express	n/a	

C.2 Market structure and key market players			
	TOP3 Market share	**Perceived competition**	**Key players**
Domestic letter post	95.6%	NRA: Low USP: Low	Poczta Polska S.A. (91.1%) InPost Sp. z o.o., General Logistics Systems Poland Sp. z o.o.
Outbound cross-border letter post	79%	NRA: Low USP: Low	Poczta Polska S.A. (78.2%) DHL UPS
Domestic parcel & express (total)	86%	NRA: Substantial USP: Intense	Estimated USP market share: n/a
B2C	n/a	NRA: n/a USP: Substantial	Poczta Polska S.A., InPost Sp. Z o.o.
B2B	n/a	NRA: n/a USP: Intense	DHL, DPD, UPS
Outbound cross-border parcel & express	95%	NRA: Substantial USP: Moderate	DHL, GLS, Poczta Polska S.A., TNT Express

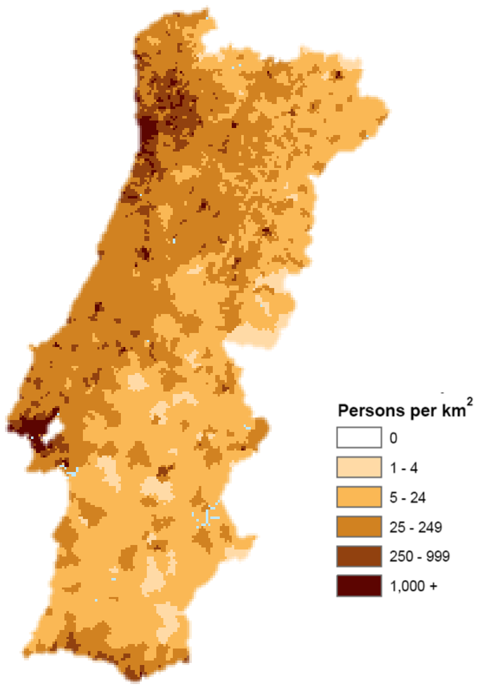
C.3 Poczta Polska (2012)		
Legal status	plc	No segment information
State ownership	100%	
Total revenue	EUR 1,472m	
Share national revenue	100%	
EBIT margin total / mail	1% / n/a	
Employment, total (headcount / FTE)	91,373 / 87,457	
Share civil servants (headcount)	0%	
Share part-time	18.6%	
Share wage costs on total costs	n/a	

PORTUGAL

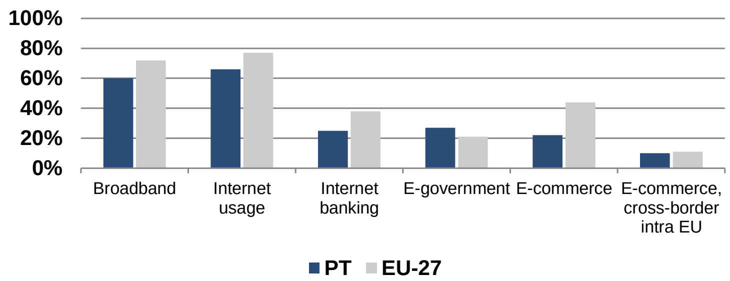
A. Country facts

Total population (2012)	10.5m
Population density (2012)	114 / sqkm
Urbanisation rate (2011)	61%
GDP growth rate (PT / EU-27)	2010: 1.9% 2011: -1.6% 2012: -3.2%
GDP per capita in PPS (2011) (in % EU-27 average)	19,700 (78%)
Transparency International CPI 2012 Score (Max. 100)	63

Portugal



ICT indicators (2012)



Online purchase per capita	EUR 89	Average growth rate (2007-2011): 24%

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	Ministry of Economy and Employment (Minister of Economy and Employment / Secretary of State of Public Works, Transport and Communication).
Ministry for ownership of PPO	Please see the answer in Additional Comments.
National regulatory authority	National Communications Authority

B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 5	Appointed by: Council of Ministers or Prime Minister
NRA resources, 2012	Budget: 46335000	Professional staff: 18
NRA authority to levy fines	Yes	Limit: 1000000
NRA authority to order remedies	Yes	
NRA right to data from USP	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	
NRA right to data from non-USPs	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	

B.3 National Competition Autority			
National competition authority	Portuguese Competition Authority		
Primary authority for competition rules	National competition authority (NCA)		
NRA/NCA cooperation	Share data: Yes	Regular consult: No	Coord agmt: Yes
NCA decisions since 2009			
State aid cases			

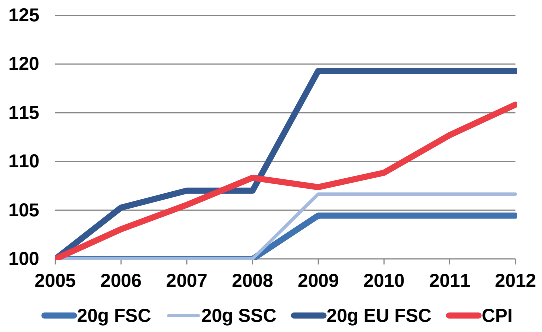
B.4 Scope of Universal Service			
Service	**Ensured**	**Price regulated**	**Service standards**
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	Yes	Yes	No
Bulk advertisements	No	---	---
Newspapers, magazines, etc.	Yes	Yes	Yes
Non-priority correspondence	Yes	Yes	Yes
Single piece parcels	Yes	Yes	Yes
Bulk parcels	Yes	Yes	No
Delivery frequency for LP	5 days per week		
Delivery frequency for parcels	5 days per week	Delivery point: Parcels required only to be held at postal outlet nearest addressee	

B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: All cross-border services	Second agency: ---	
EU v. UPU law, intra-EU	---		
EU v. UPU law, extra-EU	---		
Enforcement of Art. 13	Cost based TDs: Yes	Related to QoS: Yes	Transparent: No
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	Unknown, no information		
NRA prohibits discrimination between inbound mail from different EU mailers?	8	TD regimes: 2008 UPU old target system; 2008 UPU new target system; 2008 UPU transitional system; Reims TDs; bilateral TD agreements;	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	Unknown, no information	TD regimes: 2008 UPU old target system; bilateral TD agreements;	
Overalll net gain/ loss due to TDs not aligned to domestic postage	Moderate net loss compared to current outbound revenue		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): ---	Volume (%) : ---	
Choice between market forces, designation, and procurement	Study: Yes	National USP appointed by legislation: Yes	
Method of ensuring US	Mkt force (%): 0	Designation (%): ---	Procurement (%): ---
Households not receiving US	Letter post (% pop): ---	Parcels (% pop): ---	
Net cost of US0 in 2012	Pct USP exp: ---	Net cost study: No	
USO financed from public funds	No		
USO financed from compensation fund	Authorized: Yes	Established: No	

B.7 Universal service indicators

Price trend	2010	2013
20g FSC, domestic	EUR 0.47	EUR 0.50
20g SSC, domestic	EUR 0.32	EUR 0.36
20g FSC, EU	EUR 0.68	EUR 0.70
5kg parcel, domestic	EUR 4.70	EUR 5.25
5kg parcel, cross-border (lowest tariff)	EUR 33.00	EUR 33.00

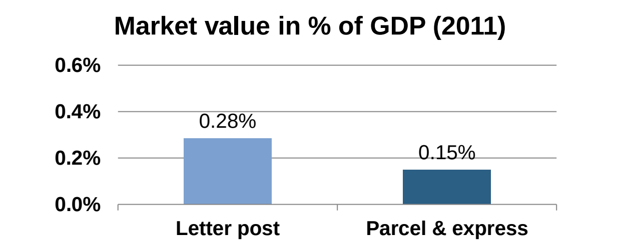


Quality of service	2010	2012	USP customer satisfaction index
Domestic target (D+1)	94.5%	94.5%	2010: 72,2% 2011: 84,4%
Performance (D+1)	94.7%	94.9%	
Postal outlets (total)	2,897	2,562	
Postal outlets per 10,000 inhabitants	2.72	2.43	
Share post offices	30.5%	29.2%	

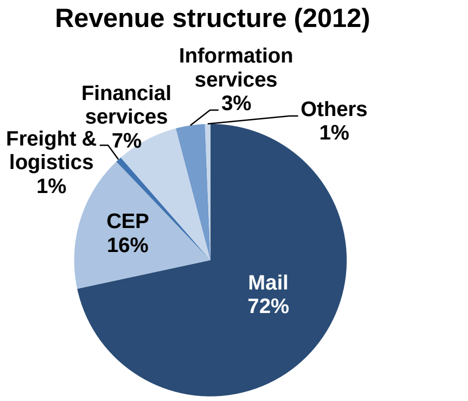
B.8 Legal Treatment of Competitive Services			
Special tariffs are transparent and non-discriminatory?	Bulk letters: Other	Direct mail: ---	Bulk parcels: Other
Special tariffs are available to other postal operators?	Bulk letters: Other	Direct mail: ---	Bulk parcels: Other
Licence required within US area	Licence required for provision of some services with the universal service area		
Use of potentially restrictive authorisation conditions	Univ. servs: No	Quality conditions: Yes	Competence: Yes
Access to postal infrastructure by competitors	Addr. database: No	Post office boxes: No	Delivery boxes: Yes
VAT: USP services exempt	other;		
Customs: USP services subject to UPU customs rules	other;		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: No	USP accepts inbound mail from EU/EEA ETOEs?: No	
Intra-EU remail restrictions	ABA remail: No	ABC remail: No	
Labour law: special rules in postal sector	No		

B.9 Protections of Users		
Protection of users by law	Yes	Both postal and consumer protection laws apply to postal users.
Implementing authority(ies)	Both NRA and NCPA enforce user protection provisions for postal services	
Users of private operators covered	Within US: Yes	Outside US: Yes
Publication of annual statistics	By USP: Yes	By NRA: ---
User complaints to USP reviewed, 2012	Percent of complaints (%): 8565	

C. Market facts

C.1 Market size and demand (2011)		
Letter post items per capita (EU-27 average)	98 (164)	
Share C2X (revenue/volume)	4% (Volume)	
Share B2X (revenue/volume)	96% (Volume)	
Parcel & express items per capita	3	
Share C2X (revenue/volume)	7% (Volume)	
Share B2X (revenue/volume)	93% (Volume)	
	Volume	**Main developments since 2007**
Domestic and inbound cross-border letter post	1,035m	Average growth rate 2007-2011: -3.0%
Outbound cross-border letter post	33.68m	Average growth rate 2007-2011: -7% Note: USP data
Domestic parcel & express	31.83m	Note: 2012
Outbound cross-border parcel & express	n/a	

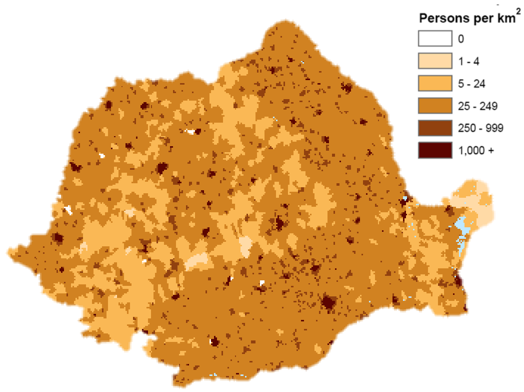
C.2 Market structure and key market players			
	TOP3 Market share	**Perceived competition**	**Key players**
Domestic letter post	99.6%	NRA: Marginal USP: Low	CTT Correios (99%) Vasp Premium Notícias Direct.
Outbound cross-border letter post	99.4%	NRA: Marginal USP: Moderate	CTT Correios (93.9%) Iberomail VASP
Domestic parcel & express (total)	68%	NRA: Substantial USP: Intense	Estimated USP market share: >20%
B2C	n/a	NRA: n/a USP: Intense	Grupo CTT
B2B	n/a	NRA: n/a USP: Intense	CTT Expresso, DHL
Outbound cross-border parcel & express	64%	NRA: Substantial USP: Intense	CTT, DHL, TNT Express, UPS

C.3 CTT Correios (2012)		
Legal status	plc	
State ownership	100%	
Total revenue	EUR 712m	
Share national revenue	92%	
EBIT margin total / mail	7.9% /3.9% (2011)	
Employment, total (headcount / FTE)	13,167 /13,701	
Share civil servants (headcount)	0%	
Share part-time	n/a	
Share wage costs on total costs	53.3% (2011)	

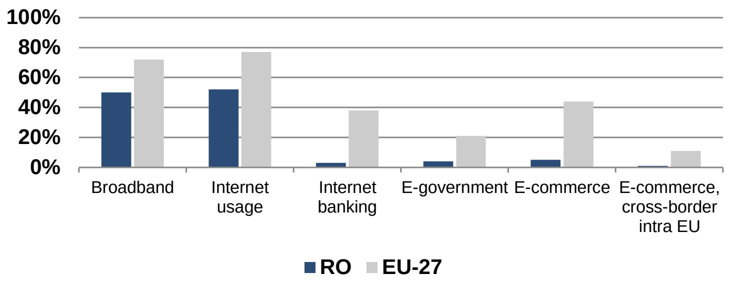
ROMANIA

A. Country facts

Total population (2012)	21.4m	**Romania**
Population density (2012)	90 / sqkm	
Urbanisation rate (2011)	53%	
GDP growth rate (RO / EU-27)	2010: -1.1% 2011: 2.2% 2012: 0.3%	
GDP per capita in PPS (2010) (in % EU-27 average)	11,400 (47%)	
Transparency International CPI 2012 Score (Max. 100)	44	



ICT indicators (2012)		



Online purchase per capita	EUR 28	Average growth rate (2007-2011): 48%

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	Ministry for the Information Society
Ministry for ownership of PPO	---
National regulatory authority	National Authority for Management and Regulation in Communications

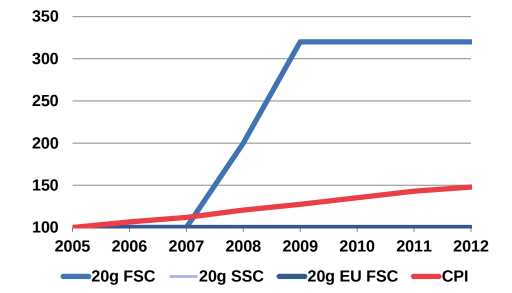
B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 1	Appointed by: Other
NRA resources, 2012	Budget:	Professional staff: 28
NRA authority to levy fines	Yes	n/a
NRA authority to order remedies	Yes	
NRA right to data from USP	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	
NRA right to data from non-USPs	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	

B.3 National Competition Autority			
National competition authority	Competition Council		
Primary authority for competition rules	National competition authority (NCA)		
NRA/NCA cooperation	Share data: Yes	Regular consult: Yes	Coord agmt: Yes
NCA decisions since 2009	52/2010 - Direct Marketing e.a./Romanian Post		
State aid cases			

B.4 Scope of Universal Service			
Service	**Ensured**	**Price regulated**	**Service standards**
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	Yes	Yes	Yes
Bulk advertisements	Yes	Yes	No
Newspapers, magazines, etc.	Yes	Yes	No
Non-priority correspondence	Yes	Yes	No
Single piece parcels	Yes	Yes	No
Bulk parcels	Yes	Yes	No
Delivery frequency for LP	5 days per week		
Delivery frequency for parcels	5 days per week	Delivery point: Parcels required only to be held at postal outlet nearest addressee	

B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: All cross-border services	Second agency: ---	
EU v. UPU law, intra-EU	EU law apply even if contrary to UPU provisions		
EU v. UPU law, extra-EU	EU law apply even if contrary to UPU provisions		
Enforcement of Art. 13	Cost based TDs: Yes	Related to QoS: Yes	Transparent: No
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	Yes		
NRA prohibits discrimination between inbound mail from different EU mailers?	---	TD regimes: 2008 UPU transitional system; Reims TDs; bilateral TD agreements;	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	Yes	TD regimes: 2008 UPU transitional system; Reims TDs; bilateral TD agreements;	
Overalll net gain/ loss due to TDs not aligned to domestic postage	No answer		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): ---	Volume (%) : ---	
Choice between market forces, designation, and procurement	Study: No	National USP appointed by legislation: Yes	
Method of ensuring US	Mkt force (%): ---	Designation (%): 86	Procurement (%): ---
Households not receiving US	Letter post (% pop): ---	Parcels (% pop): ---	
Net cost of US0 in 2012	Pct USP exp: ---	Net cost study: No	
USO financed from public funds	No		
USO financed from compensation fund	Authorized: Yes	Established: No	

B.7 Universal service indicators			
Price trend	**2010**	**2013**	
20g FSC, domestic	EUR 0.38	EUR 0.36	
20g SSC, domestic	EUR 0.24	EUR 0.22	
20g FSC, EU	EUR 0.50	EUR 0.47	
5kg parcel, domestic	EUR 1.71	EUR 1.60	
5kg parcel, cross-border (lowest tariff)	EUR 11.40	EUR 15.15	
Quality of service	**2010**	**2012**	**USP customer satisfaction index**
Domestic target (D+1)	85%	85%	
Performance (D+1)	52.6%	40.6% (2011)	
Postal outlets (total)	6,982	5,848 (2011)	
Postal outlets per 10,000 inhabitants	3.25	2.73 (2011)	
Share post offices	99.9%	99.9% (2011)	

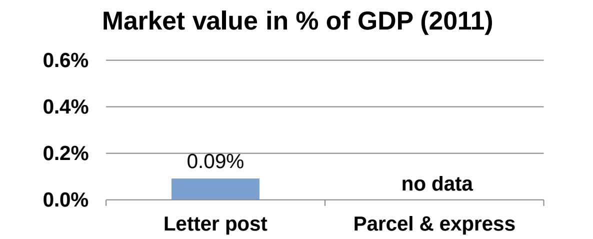
B.8 Legal Treatment of Competitive Services			
Special tariffs are transparent and non-discriminatory?	Bulk letters: Required by law but not verified in practice	Direct mail: Required by law but not verified in practice	Bulk parcels: Required by law but not verified in practice
Special tariffs are available to other postal operators?	Bulk letters: Required by law but not verified in practice	Direct mail: Not required by law or verified in practice	Bulk parcels: Not required by law or verified in practice
Licence required within US area	General authorisation required for provision of some services with the universal service area		
Use of potentially restrictive authorisation conditions	Univ. servs: No	Quality conditions: Yes	Competence: No
Access to postal infrastructure by competitors	Addr. database: No	Post office boxes: No	Delivery boxes: No
VAT: USP services exempt	Single piece letters; single piece parcels; direct mail; newspapers/periodicals; bulk parcels; outbound letter post; outbound parcel post;		
Customs: USP services subject to UPU customs rules	Inbound letters and large envelopes; inbound small packets; inbound parcels (UPU inward land rates); inbound parcels (non-UPU charges); inbound express mail items;		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: No	USP accepts inbound mail from EU/EEA ETOEs?: No	
Intra-EU remail restrictions	ABA remail: No answer	ABC remail: No answer	
Labour law: special rules in postal sector	No		

B.9 Protections of Users		
Protection of users by law	Yes	Both postal and consumer protection laws apply to postal users.
Implementing authority(ies)	Both NRA and NCPA enforce user protection provisions for postal services	
Users of private operators covered	Within US: Yes	Outside US: Yes
Publication of annual statistics	By USP: Yes	By NRA: Yes
User complaints to USP reviewed, 2012	Percent of complaints (%): ---	

C. Market facts

C.1 Market size and demand (2011)

Letter post items per capita (EU-27 average)	22 (164)
Share C2X (revenue/volume)	34% (Volume)
Share B2X (revenue/volume)	66% (Volume)
Parcel & express items per capita	2
Share C2X (revenue/volume)	48% (Revenue)
Share B2X (revenue/volume)	52% (Revenue)



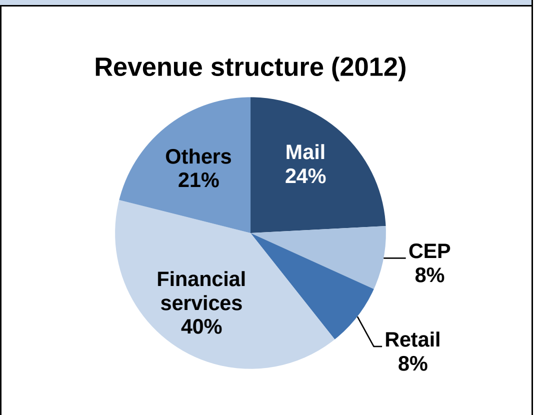
	Volume	Main developments since 2007
Domestic and inbound cross-border letter post	481m	Average growth rate 2007-2011: -7.6%
Outbound cross-border letter post	5.25m	Average growth rate 2007-2011: -18% Note: (USP data)
Domestic parcel & express	43.9m	Note: (USP 2012)
Outbound cross-border parcel & express	n/a	

C.2 Market structure and key market players

	TOP3 Market share	Perceived competition	Key players
Domestic letter post	n/a	NRA: Moderate USP: Intense	Compania Nationala Posta Românа S.A., Fan Courier Express S.R.L.,. POSTMASTER S.R.L.
Outbound cross-border letter post	n/a	NRA: Moderate USP: Intense	Compania Nationala Posta Românа S.A DHL International Romania S.R.L. UPS Romania S.R.L.
Domestic parcel & express (total)	47%	NRA: Substantial USP: Intense	Estimated USP market share: <10%
B2C	n/a	NRA: n/a USP: Intense	n/a
B2B	n/a	NRA: n/a USP: Intense	DHL, SRFLan Courier Express, SRLUrgent CurierCargus
Outbound cross-border parcel & express	n/a	NRA: Moderate USP: Intense	DHL, Fan Courier Express SRL, Posta Atlassib Curier Rapid S.R.L., TNT Express, UPS

C.3 Compania Nationala Posta Românа (2012)

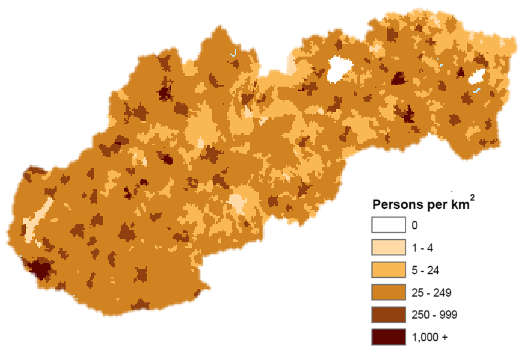
Legal status	plc
State ownership	75% state ownership 25% S.C. Fondul Proprietatea S.A.
Total revenue	EUR 283m
Share national revenue	100%
EBIT margin total / mail	-4.2% / n/a
Employment, total (headcount / FTE)	32,887 / 32,460
Share civil servants (headcount)	0%
Share part-time	3.9%
Share wage costs on total costs	68.1%

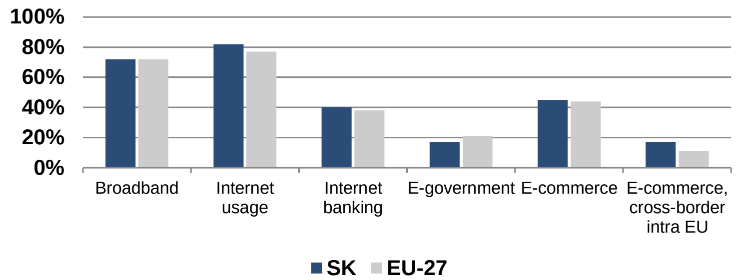


SLOVAK REPUBLIC

A. Country facts

Total population (2012)	5.4m	Slovak Republic
Population density (2012)	110 / sqkm	
Urbanisation rate (2011)	55%	
GDP growth rate (SK / EU-27)	2010: 4.4% 2011: 3.2% 2012: 2.0%	
GDP per capita in PPS (2011) (in % EU-27 average)	18,400 (73%)	
Transparency International CPI 2012 Score (Max. 100)	46	
ICT indicators (2012)		
Online purchase per capita	EUR 74	Average growth rate (2007-2011): 78%





B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	Ministry of Transport, Construction and Regional Development of the Slovak Republic
Ministry for ownership of PPO	---
National regulatory authority	Postal Regulatory Office

B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 1	Appointed by: Parliament
NRA resources, 2012	Budget: 499502	Professional staff: 15
NRA authority to levy fines	Yes	Limit: 100000
NRA authority to order remedies	Yes	
NRA right to data from USP	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	
NRA right to data from non-USPs	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	

B.3 National Competition Autority			
National competition authority	Antimonopoly Office of the Slovak Republic		
Primary authority for competition rules	National competition authority (NCA)		
NRA/NCA cooperation	Share data: Yes	Regular consult: No	Coord agmt: No
NCA decisions since 2009			
State aid cases			

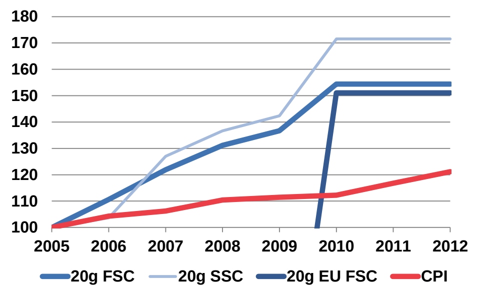
B.4 Scope of Universal Service			
Service	Ensured	Price regulated	Service standards
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	Yes	Yes	Yes
Bulk advertisements	Yes	Yes	Yes
Newspapers, magazines, etc.	No	Yes	No
Non-priority correspondence	Yes	Yes	Yes
Single piece parcels	Yes	Yes	Yes
Bulk parcels	Yes	Yes	Yes
Delivery frequency for LP	5 days per week		
Delivery frequency for parcels	5 days per week	Delivery point: Parcels must be delivered without charge to addressee	

B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: All cross-border services	Second agency: ---	
EU v. UPU law, intra-EU	UPU provisions apply even if contrary to EU law		
EU v. UPU law, extra-EU	EU law apply even if contrary to UPU provisions		
Enforcement of Art. 13	Cost based TDs: Yes	Related to QoS: Yes	Transparent: No
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	Yes		
NRA prohibits discrimination between inbound mail from different EU mailers?	---	TD regimes: 2008 UPU old target system; Reims TDs; bilateral TD agreements;	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	Yes	TD regimes: 2008 UPU old target system; 2008 UPU new target system; 2008 UPU transitional system;	
Overalll net gain/ loss due to TDs not aligned to domestic postage	No answer		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): 1	Volume (%) : 5	
Choice between market forces, designation, and procurement	Study: No	National USP appointed by legislation: Yes	
Method of ensuring US	Mkt force (%): 70	Designation (%): 100	Procurement (%): ---
Households not receiving US	Letter post (% pop): 0.4	Parcels (% pop): 0.4	
Net cost of US0 in 2012	Pct USP exp: 6.7	Net cost study: Yes	
USO financed from public funds	No		
USO financed from compensation fund	Authorized: Yes	Established: Yes	

B.7 Universal service indicators

Price trend	2010	2013
20g FSC, domestic	EUR 0.60	EUR 0.65
20g SSC, domestic	EUR 0.40	EUR 0.45
20g FSC, EU	EUR 0.90	EUR 0.90
5kg parcel, domestic	EUR 2.50	EUR 3.20
5kg parcel, cross-border (lowest tariff)	EUR 25.00	EUR 25.00



Quality of service	2010	2012	USP customer satisfaction index
Domestic target (D+1)	96%	96%	2010: 71%
Performance (D+1)	96.8%	96%	
Postal outlets (total)	1,595	1,585	
Postal outlets per 10,000 inhabitants	2.94	2.93	
Share post offices	97.1%	97.2%	

B.8 Legal Treatment of Competitive Services

Special tariffs are transparent and non-discriminatory?	Bulk letters: Not required by law but verified in practice	Direct mail: Not required by law but verified in practice	Bulk parcels: Not required by law but verified in practice
Special tariffs are available to other postal operators?	Bulk letters: Not required by law but verified in practice	Direct mail: Not required by law but verified in practice	Bulk parcels: Not required by law but verified in practice
Licence required within US area	General authorisation required for provision of some services with the universal service area		
Use of potentially restrictive authorisation conditions	Univ. servs: No	Quality conditions: No	Competence: Yes
Access to postal infrastructure by competitors	Addr. database: No	Post office boxes: No	Delivery boxes: Yes
VAT: USP services exempt	Single piece letters; single piece parcels; direct mail; bulk parcels; outbound letter post; outbound parcel post; other;		
Customs: USP services subject to UPU customs rules	---		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: No	USP accepts inbound mail from EU/EEA ETOEs?: Unknown, no information	
Intra-EU remail restrictions	ABA remail: No	ABC remail: No	
Labour law: special rules in postal sector	No		

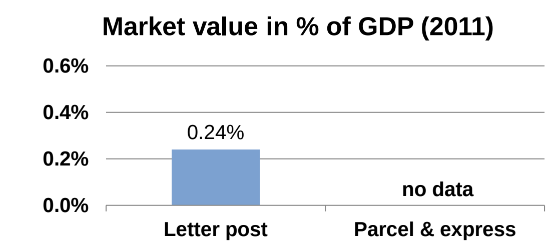
B.9 Protections of Users

Protection of users by law	Yes	Both postal and consumer protection laws apply to postal users.
Implementing authority(ies)	Postal NRA enforces user protection provisions for postal services	
Users of private operators covered	Within US: Yes	Outside US: Yes
Publication of annual statistics	By USP: Yes	By NRA: Yes
User complaints to USP reviewed, 2012	Percent of complaints (%): 37	

C. Market facts

C.1 Market size and demand (2011)

Letter post items per capita (EU-27 average)	57 (164)
Share C2X (revenue/volume)	14% (Volume)
Share B2X (revenue/volume)	86% (Volume)
Parcel & express items per capita	5
Share C2X (revenue/volume)	8% (Revenue)
Share B2X (revenue/volume)	92% (Revenue)



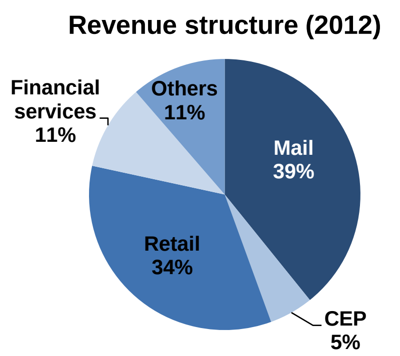
	Volume	Main developments since 2007
Domestic and inbound cross-border letter post	306m	Average growth rate 2007-2011: -0.8%
Outbound cross-border letter post	9.69m	Average growth rate 2007-2011: -8.6% Note: (USP data)
Domestic parcel & express	25.18m	
Outbound cross-border parcel & express	n/a	

C.2 Market structure and key market players

	TOP3 Market share	Perceived competition	Key players
Domestic letter post	97.7%	NRA: Low USP: Substantial	Slovenská pošta (94.6%) Cromwell Tatra Billing
Outbound cross-border letter post	100%	NRA: Low USP: Moderate	Slovenská pošta (99.9%) DHL Express Cromwell
Domestic parcel & express (total)	67%	NRA: Intense USP: Intense	Estimated USP market share:15-20%
B2C	n/a	NRA: Intense USP: Intense	Slovenska Posta, DPD, GLS
B2B	n/a	NRA: Moderate USP: Intense	Slovenska Posta, DPD, GLS, UPS
Outbound cross-border parcel & express	75%	NRA: Intense USP: Intense	DHL, DPD, Slovenska Posta, UPS

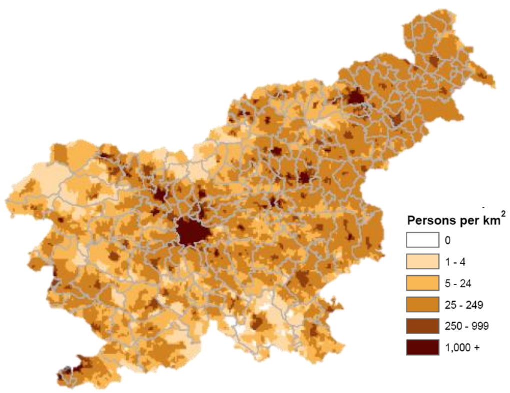
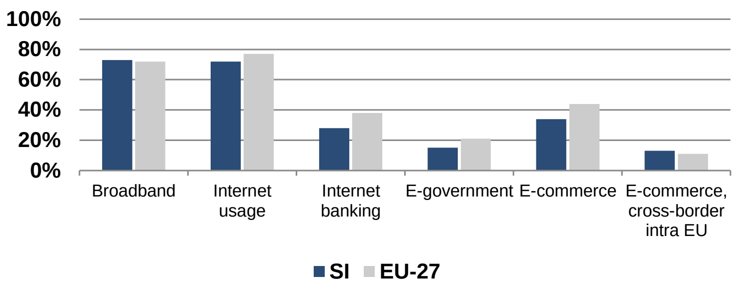
C.3 Slovenská Pošta (2011)

Legal status	plc
State ownership	100%
Total revenue	EUR 287m
Share national revenue	100%
EBIT margin total / mail	-2.3% / n/a
Employment, total (headcount / FTE)	14,297 / 13,740
Share civil servants (headcount)	0%
Share part-time	33.9%
Share wage costs on total costs	52.2%



SLOVENIA

A. Country facts

Total population (2012)	2.1m	**Slovenia** 
Population density (2012)	101 / sqkm	
Urbanisation rate (2011)	50%	
GDP growth rate (SI / EU-27)	2010: 1.2% 2011: 0.6% 2012: -2.3%	
GDP per capita in PPS (2011) (in % EU-27 average)	21,000 (84%)	
Transparency International CPI 2012 Score (Max. 100)	61	
ICT indicators (2012)		
Online purchase per capita	n.a.	Average growth rate (2007-2011): n.a.

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	Ministry of Economic Development and Technology
Ministry for ownership of PPO	---
National regulatory authority	Postal and Electronic Communications Agency of the Republic of Slovenia

B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 12	Appointed by: Council of Ministers or Prime Minister
NRA resources, 2012	Budget: 404000	Professional staff: 4.5
NRA authority to levy fines	Yes	Limit: 400000
NRA authority to order remedies	Yes	
NRA right to data from USP	Compliance data: Yes for all postal services; Statistics: Universal service area only	
NRA right to data from non-USPs	Compliance data: Universal service area only; Statistics: Universal service area only	

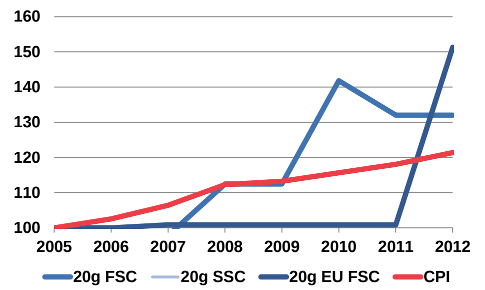
B.3 National Competition Autority			
National competition authority	Competition Protection Agency		
Primary authority for competition rules	National competition authority (NCA)		
NRA/NCA cooperation	Share data: Yes	Regular consult: Yes	Coord agmt: No
NCA decisions since 2009			
State aid cases			

B.4 Scope of Universal Service			
Service	**Ensured**	**Price regulated**	**Service standards**
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	No	No answer	No answer
Bulk advertisements	No	No answer	No answer
Newspapers, magazines, etc.	Yes	Yes	Yes
Non-priority correspondence	No	No	---
Single piece parcels	Yes	Yes	Yes
Bulk parcels	No	No	No
Delivery frequency for LP	5 days per week		
Delivery frequency for parcels	5 days per week	Delivery point: Parcels must be delivered without charge to addressee	

B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: All cross-border services	Second agency: ---	
EU v. UPU law, intra-EU	EU law apply even if contrary to UPU provisions		
EU v. UPU law, extra-EU	EU law apply even if contrary to UPU provisions		
Enforcement of Art. 13	Cost based TDs: Yes	Related to QoS: Yes	Transparent: No
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	Yes		
NRA prohibits discrimination between inbound mail from different EU mailers?	2	TD regimes: Reims TDs; bilateral TD agreements;	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	Yes	TD regimes: 2008 UPU old target system; 2008 UPU transitional system;	
Overalll net gain/ loss due to TDs not aligned to domestic postage	Substantial net gain compared to current outbound revenue		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): 20	Volume (%) : 1	
Choice between market forces, designation, and procurement	Study: Yes	National USP appointed by legislation: Yes	
Method of ensuring US	Mkt force (%): 15	Designation (%): 85	Procurement (%): ---
Households not receiving US	Letter post (% pop): 0	Parcels (% pop): 0	
Net cost of US0 in 2012	Pct USP exp: ---	Net cost study: No	
USO financed from public funds	No		
USO financed from compensation fund	Authorized: Yes	Established: No	

B.7 Universal service indicators		
Price trend	**2010**	**2013**
20g FSC, domestic	EUR 0.29	EUR 0.27
20g SSC, domestic		
20g FSC, EU	EUR 0.40	EUR 0.60
5kg parcel, domestic	EUR 4.59	EUR 3.83
5kg parcel, cross-border (lowest tariff)	EUR 24.58	EUR 20.48



Quality of service	**2010**	**2012**	**USP customer satisfaction index**
Domestic target (D+1)	95%	95%	
Performance (D+1)	95.5%	97.3%	
Postal outlets (total)	557	556	
Postal outlets per 10,000 inhabitants	2.72	2.7	
Share post offices	99.5%	98.6%	

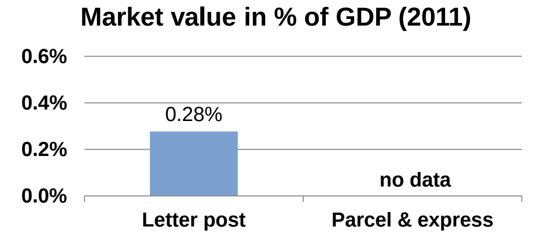
B.8 Legal Treatment of Competitive Services			
Special tariffs are transparent and non-discriminatory?	Bulk letters: Required by law and verified in practice	Direct mail: Not required by law or verified in practice	Bulk parcels: No answer
Special tariffs are available to other postal operators?	Bulk letters: Required by law and verified in practice	Direct mail: Not required by law or verified in practice	Bulk parcels: No answer
Licence required within US area	General authorisation required for provision of some services with the universal service area		
Use of potentially restrictive authorisation conditions	Univ. servs: Yes	Quality conditions: No	Competence: No
Access to postal infrastructure by competitors	Addr. database: Yes	Post office boxes: Yes	Delivery boxes: No
VAT: USP services exempt	---		
Customs: USP services subject to UPU customs rules	Inbound letters and large envelopes; inbound small packets; inbound parcels (UPU inward land rates);		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: No	USP accepts inbound mail from EU/EEA ETOEs?: Unknown, no information	
Intra-EU remail restrictions	ABA remail: Unknown, no information	ABC remail: Unknown, no information	
Labour law: special rules in postal sector	No		

B.9 Protections of Users		
Protection of users by law	Yes	Both postal and consumer protection laws apply to postal users.
Implementing authority(ies)	Postal NRA enforces user protection provisions for postal services	
Users of private operators covered	Within US: Yes	Outside US: Yes
Publication of annual statistics	By USP: Yes	By NRA: Yes
User complaints to USP reviewed, 2012	Percent of complaints (%): 19	

C. Market facts

C.1 Market size and demand (2011)

Letter post items per capita (EU-27 average)	161 (164)
Share C2X (revenue/volume)	4% (Volume)
Share B2X (revenue/volume)	96% (Volume)
Parcel & express items per capita	2
Share C2X (revenue/volume)	3% (Revenue)
Share B2X (revenue/volume)	97% (Revenue)



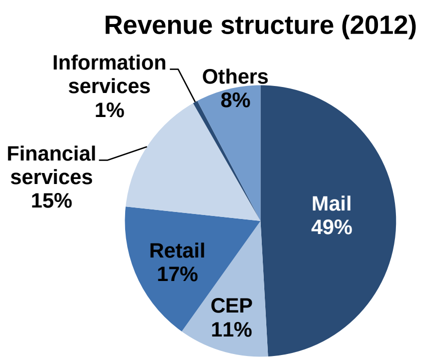
	Volume	Main developments since 2007
Domestic and inbound cross-border letter post	329m	Average growth rate 2007-2011: -2.8%
Outbound cross-border letter post	7.58m	Average growth rate 2007-2011: -2.2% Note: (USP data)
Domestic parcel & express	4.64m	
Outbound cross-border parcel & express	n/a	

C.2 Market structure and key market players

	TOP3 Market share	Perceived competition	Key players
Domestic letter post	n/a	NRA: Low USP: Substantial	KRO d.o.o. (98%) Maksmail d.o.o. Cetis d.o.o.
Outbound cross-border letter post	n/a	NRA: n/a USP: Low	DHL TNT UPS Business Express
Domestic parcel & express (total)	80%	NRA: Intense USP: Substantial	Estimated USP market share:15-20%
B2C	n/a	NRA: Intense USP: Substantial	Posta Slovenije, DPD, GLS
B2B	n/a	NRA: Intense USP: Intense	Posta Slovenije, DPD,GLS, TNT Express
Outbound cross-border parcel & express	71%	NRA: Intense USP: Intense	DHL, DPD, GLS, TNT Express, UPS

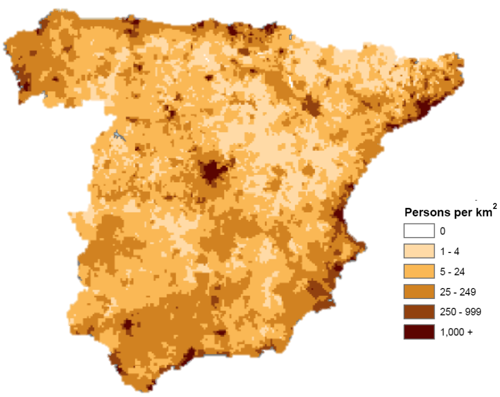
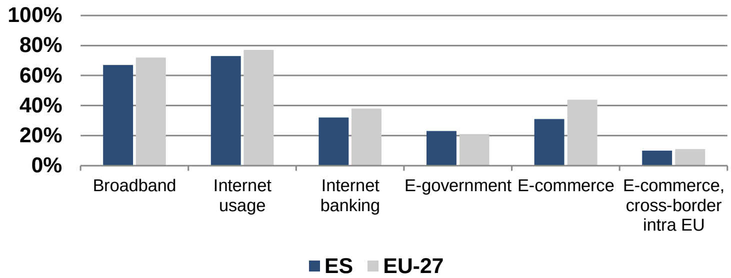
C.3 Pošta Slovenije (2012)

Legal status	plc
State ownership	100%
Total revenue	EUR 231m
Share national revenue	94%
EBIT margin total / mail	2.8% / n/a
Employment, total (headcount / FTE)	6,382 / 5,997
Share civil servants (headcount)	n/a
Share part-time	2.7%
Share wage costs on total costs	66%



SPAIN

A. Country facts

Total population (2012)	46.2m	**Spain** 
Population density (2012)	91 / sqkm	
Urbanisation rate (2011)	77%	
GDP growth rate (ES / EU-27)	2010: -0.3% 2011: 0.4% 2012: -1.4%	
GDP per capita in PPS (2011) (in % EU-27 average)	24,700 (98%)	
Transparency International CPI 2012 Score (Max. 100)	65	
ICT indicators (2012)		
Online purchase per capita	EUR 198	Average growth rate (2007-2011): 24%

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	Minister of Foment
Ministry for ownership of PPO	Ministry of Finance and Public Administration (through the State Industrial Holdings Company)
National regulatory authority	Postal Sector's National Commission

B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 7	Appointed by: Council of Ministers or Prime Minister
NRA resources, 2012	Budget:	Professional staff: 12
NRA authority to levy fines	Yes	Limit: 400000
NRA authority to order remedies	---	
NRA right to data from USP	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	
NRA right to data from non-USPs	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	

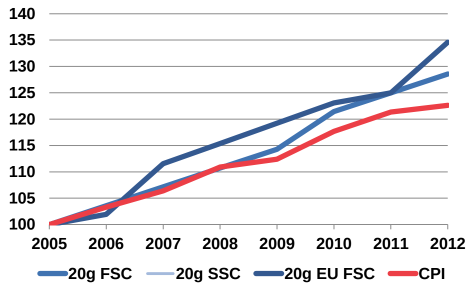
B.3 National Competition Autority			
National competition authority	National Competition Commission		
Primary authority for competition rules	National competition authority (NCA)		
NRA/NCA cooperation	Share data: Yes	Regular consult: Yes	Coord agmt: No
NCA decisions since 2009	▪ S/034/11 - Ass/Correos ▪ VATC/2458/03 - ASEMPRE/Correos ▪ S/037/11 - Unipost/Correos (on-going)		
State aid cases			

B.4 Scope of Universal Service			
Service	Ensured	Price regulated	Service standards
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	Yes	Yes	Yes
Bulk advertisements	No	No	---
Newspapers, magazines, etc.	No	No	---
Non-priority correspondence	No	No	---
Single piece parcels	Yes	Yes	Yes
Bulk parcels	Yes	Yes	Yes
Delivery frequency for LP	5 days per week		
Delivery frequency for parcels	5 days per week	Delivery point: Parcels must be delivered without charge to addressee	

B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: No answer	Second agency: ---	
EU v. UPU law, intra-EU	UPU provisions apply except for EU competition and customs rules		
EU v. UPU law, extra-EU	UPU provisions apply except for EU competition and customs rules		
Enforcement of Art. 13	Cost based TDs: ---	Related to QoS: ---	Transparent: ---
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	---		
NRA prohibits discrimination between inbound mail from different EU mailers?	---	TD regimes: ---	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	---	TD regimes: ---	
Overalll net gain/ loss due to TDs not aligned to domestic postage	---		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): ---	Volume (%) : ---	
Choice between market forces, designation, and procurement	Study: No	National USP appointed by legislation: Yes	
Method of ensuring US	Mkt force (%): ---	Designation (%): 100	Procurement (%): ---
Households not receiving US	Letter post (% pop): 0	Parcels (% pop): 0	
Net cost of US0 in 2012	Pct USP exp: 17.16	Net cost study: Yes	
USO financed from public funds	Yes		
USO financed from compensation fund	Authorized: Yes	Established: No	

B.7 Universal service indicators		
Price trend	**2010**	**2013**
20g FSC, domestic	EUR 0.34	EUR 0.37
20g SSC, domestic		
20g FSC, EU	EUR 0.64	EUR 0.75
5kg parcel, domestic	EUR 5.10	EUR 5.99
5kg parcel, cross-border (lowest tariff)	EUR 36.43	EUR 39.69



Quality of service	**2010**	**2011**	**USP customer satisfaction index**
Domestic target (D+1)			2011: 83%
Performance (D+1)	69.6%	70.5%	
Postal outlets (total)	2,360	2,379	
Postal outlets per 10,000 inhabitants	0.51	0.52	
Share post offices	100%	100%	

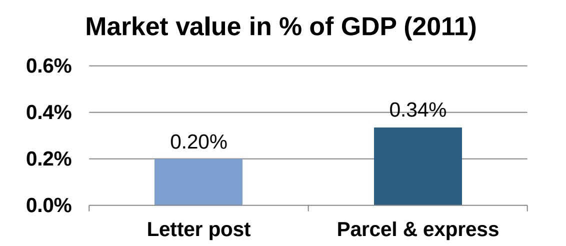
B.8 Legal Treatment of Competitive Services			
Special tariffs are transparent and non-discriminatory?	Bulk letters: ---	Direct mail: ---	Bulk parcels: Required by law but not verified in practice
Special tariffs are available to other postal operators?	Bulk letters: ---	Direct mail: ---	Bulk parcels: Required by law but not verified in practice
Licence required within US area	Licence required for provision of some services with the universal service area		
Use of potentially restrictive authorisation conditions	Univ. servs: No	Quality conditions: No	Competence: No
Access to postal infrastructure by competitors	Addr. database: No	Post office boxes: No	Delivery boxes: Yes
VAT: USP services exempt	---		
Customs: USP services subject to UPU customs rules	---		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: ---	USP accepts inbound mail from EU/EEA ETOEs?: ---	
Intra-EU remail restrictions	ABA remail: ---	ABC remail: ---	
Labour law: special rules in postal sector	No		

B.9 Protections of Users		
Protection of users by law	Yes	Both postal and consumer protection laws apply to postal users.
Implementing authority(ies)	Postal NRA enforces user protection provisions for postal services	
Users of private operators covered	Within US: Yes	Outside US: Yes
Publication of annual statistics	By USP: ---	By NRA: ---
User complaints to USP reviewed, 2012	Percent of complaints (%): ---	

C. Market facts

C.1 Market size and demand (2011)

Letter post items per capita (EU-27 average)	101 (164)
Share C2X (revenue/volume)	n/a
Share B2X (revenue/volume)	n/a
Parcel & express items per capita	6
Share C2X (revenue/volume)	n/a
Share B2X (revenue/volume)	n/a



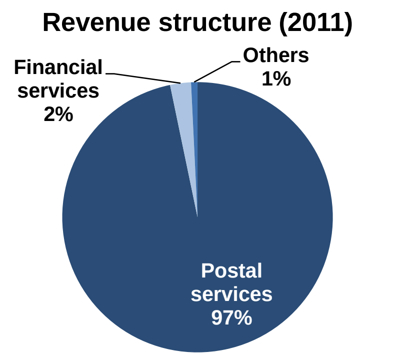
	Volume	Main developments since 2007
Domestic and inbound cross-border letter post	4,645m	Average growth rate 2007-2011: -6.6%
Outbound cross-border letter post	n/a	n/a
Domestic parcel & express	296m	
Outbound cross-border parcel & express	n/a	

C.2 Market structure and key market players

	TOP3 Market share	Perceived competition	Key players
Domestic letter post	97.1%	NRA: Intense USP: Intense	Correos (91.9%) Unipost Zeleris Akropost
Outbound cross-border letter post	n/a	NRA: n/a USP: Intense	Asendia DHL Global Mail Spring
Domestic parcel & express (total)	n/a	NRA: n/a USP: Intense	Estimated USP market share: 5-10%
B2C	n/a	NRA: n/a USP: Intense	Correos, Kiala / UPS, MRW
B2B	n/a	NRA: n/a USP: Intense	MRW, DHL, Seur
Outbound cross-border parcel & express	n/a	NRA: n/a USP: Intense	DHL, FedEx, UPS

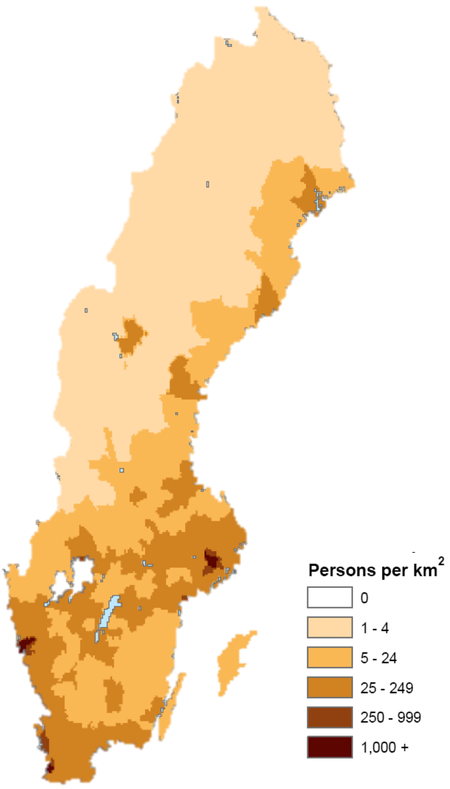
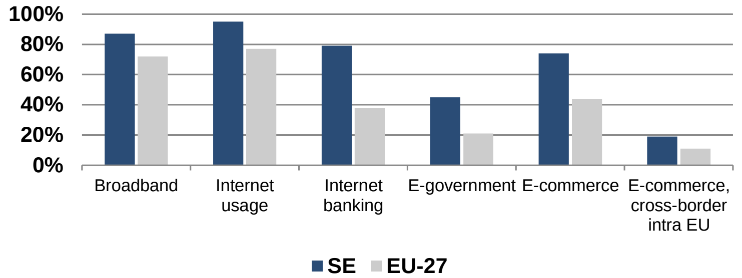
C.3 Correos (2011)

Legal status	plc
State ownership	100%
Total revenue	EUR 2,137m
Share national revenue	100%
EBIT margin total / mail	0.1% / n/a
Employment, total (headcount / FTE)	n/a / 60,770
Share civil servants (headcount)	38%
Share part-time	n/a
Share wage costs on total costs	73%



SWEDEN

A. Country facts

Total population (2012)	9.5m	**Sweden** 
Population density (2012)	22 / sqkm	
Urbanisation rate (2011)	85%	
GDP growth rate (SE / EU-27)	2010: 6.6% 2011: 3.7% 2012: 0.8%	
GDP per capita in PPS (2011) (in % EU-27 average)	31,800 (127%)	
Transparency International CPI 2012 Score (Max. 100)	88	
ICT indicators (2012)		
Online purchase per capita	EUR 833	Average growth rate (2007-2011): 18%

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	The Ministry of Enterprise
Ministry for ownership of PPO	The Ministry of Finance
National regulatory authority	The Swedish Post and Telecom Authority

B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 10	Appointed by: Postal Minister or ministry staff
NRA resources, 2012	Budget: 890718	Professional staff: 9
NRA authority to levy fines	Yes	n/a
NRA authority to order remedies	No	
NRA right to data from USP	Compliance data: Yes for all postal services; Statistics: Other	
NRA right to data from non-USPs	Compliance data: Yes for all postal services; Statistics: Other	

B.3 National Competition Autority			
National competition authority	Swedish Competition Authority		
Primary authority for competition rules	National competition authority (NCA)		
NRA/NCA cooperation	Share data: No	Regular consult: Yes	Coord agmt: Yes
NCA decisions since 2009	▪ NCA/Posten ▪ 2011/14 - Market Court, BringCityMail/Posten		
State aid cases			

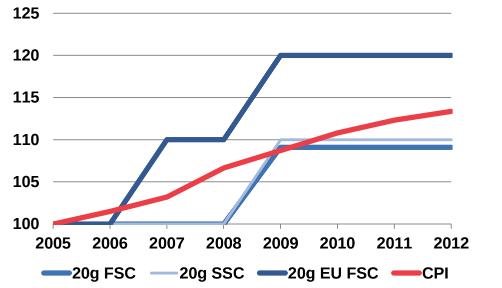
B.4 Scope of Universal Service			
Service	**Ensured**	**Price regulated**	**Service standards**
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	No	Yes	No
Bulk advertisements	No	Yes	No
Newspapers, magazines, etc.	No	Yes	No
Non-priority correspondence	No	Yes	No
Single piece parcels	Yes	Yes	No
Bulk parcels	No	Yes	No
Delivery frequency for LP	5 days per week		
Delivery frequency for parcels	Other	Delivery point: Other	

B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: Other	Second agency: ---	
EU v. UPU law, intra-EU	Other		
EU v. UPU law, extra-EU	Other		
Enforcement of Art. 13	Cost based TDs: Yes	Related to QoS: Yes	Transparent: No
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	Unknown, no information		
NRA prohibits discrimination between inbound mail from different EU mailers?	---	TD regimes: 2008 UPU old target system; 2008 UPU new target system; 2008 UPU transitional system; Reims TDs; bilateral TD agreements;	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	Unknown, no information	TD regimes: 2008 UPU old target system; 2008 UPU new target system; 2008 UPU transitional system; Reims TDs; bilateral TD agreements;	
Overalll net gain/ loss due to TDs not aligned to domestic postage	No answer		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): 0.03	Volume (%) : 0.03	
Choice between market forces, designation, and procurement	Study: Yes	National USP appointed by legislation: Yes	
Method of ensuring US	Mkt force (%): 99.07	Designation (%): 90	Procurement (%): 0.03
Households not receiving US	Letter post (% pop): 0	Parcels (% pop): ---	
Net cost of US0 in 2012	Pct USP exp: ---	Net cost study: Yes	
USO financed from public funds	No		
USO financed from compensation fund	Authorized: No	Established: No	

B.7 Universal service indicators

Price trend	2010	2013
20g FSC, domestic	EUR 0.63	EUR 0.69
20g SSC, domestic	EUR 0.58	EUR 0.64
20g FSC, EU		EUR 1.39
5kg parcel, domestic		EUR 21.38
5kg parcel, cross-border (lowest tariff)		EUR 54.33



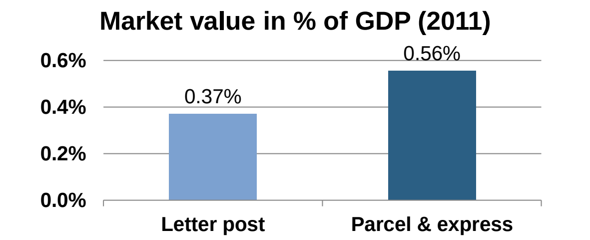
Quality of service	2010	2012	USP customer satisfaction index
Domestic target (D+1)	85%	85%	2010: 70% 2011: 70% 2012: 71%
Performance (D+1)	93.7%	94.8%	
Postal outlets (total)	1,880	1,841	
Postal outlets per 10,000 inhabitants	2.01	1.94	
Share post offices	16.5%	15.8%	

B.8 Legal Treatment of Competitive Services			
Special tariffs are transparent and non-discriminatory?	Bulk letters: Required by law and verified in practice	Direct mail: Required by law and verified in practice	Bulk parcels: No answer
Special tariffs are available to other postal operators?	Bulk letters: Required by law and verified in practice	Direct mail: Required by law and verified in practice	Bulk parcels: No answer
Licence required within US area	Other		
Use of potentially restrictive authorisation conditions	Univ. servs: Yes	Quality conditions: Yes	Competence: No
Access to postal infrastructure by competitors	Addr. database: No	Post office boxes: Yes	Delivery boxes: No
VAT: USP services exempt	---		
Customs: USP services subject to UPU customs rules	other;		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: No	USP accepts inbound mail from EU/EEA ETOEs?: No	
Intra-EU remail restrictions	ABA remail: Unknown, no information	ABC remail: Unknown, no information	
Labour law: special rules in postal sector	No		

B.9 Protections of Users		
Protection of users by law	Yes	Both postal and consumer protection laws apply to postal users.
Implementing authority(ies)	Both NRA and NCPA enforce user protection provisions for postal services	
Users of private operators covered	Within US: Yes	Outside US: Yes
Publication of annual statistics	By USP: Yes	By NRA: No answer
User complaints to USP reviewed, 2012	Percent of complaints (%): ---	

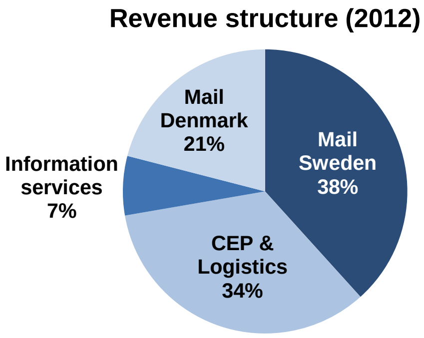
C. Market facts

C.1 Market size and demand (2011)		
Letter post items per capita (EU-27 average)	294 (164)	
Share C2X (revenue/volume)	7% (Volume)	
Share B2X (revenue/volume)	93% (Volume)	
Parcel & express items per capita	8	
Share C2X (revenue/volume)	n/a	
Share B2X (revenue/volume)	n/a	



	Volume	Main developments since 2007
Domestic and inbound cross-border letter post	2,768m	Average growth rate 2007-2011: -3.2%
Outbound cross-border letter post	n/a	n/a
Domestic parcel & express	71.16m	
Outbound cross-border parcel & express	n/a	

C.2 Market structure and key market players			
	TOP3 Market share	**Perceived competition**	**Key players**
Domestic letter post	99.6%	NRA: Moderate USP: Intense	Posten AB (92.9%) Bring CityMail AB Luleå Mail HB
Outbound cross-border letter post	n/a	NRA: Low USP: Substantial	Posten AB
Domestic parcel & express (total)	n/a	NRA: Intense USP: Intense	Estimated USP market share: >30%
B2C	n/a	NRA: Substantial USP: Intense	Posten AB, DHL, Schenker
B2B	n/a	NRA: Intense USP: Intense	Posten AB, Bring, Schenker
Outbound cross-border parcel & express	n/a	NRA: Substantial USP: n/a	Posten AB , Schenker, UPS

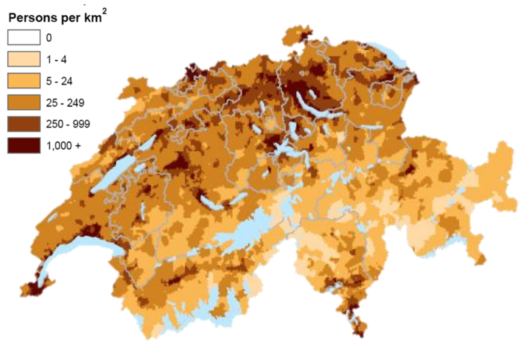
C.3 PostNord / Posten (2012)		
Legal status	plc	
State ownership	60% Subsidiary of PostNord AB (40% owned by Danish state)	
Total revenue	EUR 1,946m	
Share national revenue	n/a	
EBIT margin total / mail	0.9% / 5.2%	
Employment, total (headcount / FTE)	39,713 / n/a	
Share civil servants (headcount)	n/a	
Share part-time	n/a	
Share wage costs on total costs	47.6%	

SWITZERLAND

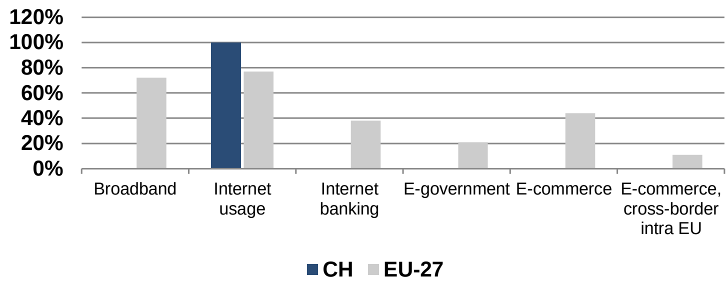
A. Country facts

Total population (2012)	8.0m
Population density (2012)	193 / sqkm
Urbanisation rate (2011)	74%
GDP growth rate (CH / EU-27)	2010: 3.0% 2011: 1.9% 2012: 1.0%
GDP per capita in PPS (2011) (in % EU-27 average)	39,600 (157%)
Transparency International CPI 2012 Score (Max. 100)	86

Switzerland



ICT indicators (2012)



Online purchase per capita	EUR 980	Average growth rate (2007-2011): 27%

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	Federal Office of Communications
Ministry for ownership of PPO	Federal Department of the Environment, Transport, Energy and Communications and Federal Finance Administration
National regulatory authority	Federal Postal Services Commission (PostCom)

B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 7	Appointed by: Council of Ministers or Prime Minister
NRA resources, 2012	Budget: 1998174	Professional staff: 6.5
NRA authority to levy fines	Yes	n/a
NRA authority to order remedies	Yes	
NRA right to data from USP	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	
NRA right to data from non-USPs	Compliance data: Other; Statistics: Yes for all postal services	

B.3 National Competition Autority			
National competition authority	Competition Commission		
Primary authority for competition rules	Other		
NRA/NCA cooperation	Share data: No	Regular consult: No	Coord agmt: ---
NCA decisions since 2009			
State aid cases			

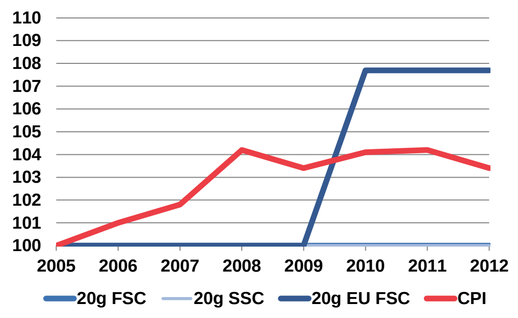
B.4 Scope of Universal Service			
Service	**Ensured**	**Price regulated**	**Service standards**
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	Yes	Yes	No
Bulk advertisements	No	No answer	No answer
Newspapers, magazines, etc.	Yes	Yes	No
Non-priority correspondence	Yes	Yes	Yes
Single piece parcels	Yes	Yes	Yes
Bulk parcels	Yes	Yes	No
Delivery frequency for LP	5 days per week		
Delivery frequency for parcels	5 days per week	Delivery point: Parcels must be delivered without charge to addressee	

B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: ---	Second agency: ---	
EU v. UPU law, intra-EU	---		
EU v. UPU law, extra-EU	---		
Enforcement of Art. 13	Cost based TDs: ---	Related to QoS: ---	Transparent: ---
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	---		
NRA prohibits discrimination between inbound mail from different EU mailers?	---	TD regimes: ---	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	---	TD regimes: ---	
Overalll net gain/ loss due to TDs not aligned to domestic postage	---		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): 5.2	Volume (%) : 29.1	
Choice between market forces, designation, and procurement	Study: Unknown, no information	National USP appointed by legislation: Yes	
Method of ensuring US	Mkt force (%): ---	Designation (%): 96.2	Procurement (%): 0
Households not receiving US	Letter post (% pop): 0.04	Parcels (% pop): 0.04	
Net cost of US0 in 2012	Pct USP exp: ---	Net cost study: Yes	
USO financed from public funds	No		
USO financed from compensation fund	Authorized: No	Established: No	

B.7 Universal service indicators

Price trend	2010	2013
20g FSC, domestic	EUR 0.72	EUR 0.83
20g SSC, domestic	EUR 0.62	EUR 0.70
20g FSC, EU	EUR 1.01	EUR 1.16
5kg parcel, domestic	EUR 6.52	EUR 7.44
5kg parcel, cross-border (lowest tariff)	EUR 32.60	EUR 37.22



Quality of service	2010	2012	USP customer satisfaction index
Domestic target (D+1)	97%	97%	2010: 75% 2011: 79% 2012: 79%
Performance (D+1)	97.2%	97.9%	
Postal outlets (total)	2,313	2,254	
Postal outlets per 10,000 inhabitants	2.97	2.83	
Share post offices	84.3%	77.7%	

B.8 Legal Treatment of Competitive Services

Special tariffs are transparent and non-discriminatory?	Bulk letters: Not required by law or verified in practice	Direct mail: No answer	Bulk parcels: Not required by law or verified in practice
Special tariffs are available to other postal operators?	Bulk letters: Not required by law or verified in practice	Direct mail: No answer	Bulk parcels: Not required by law or verified in practice
Licence required within US area	General authorisation required for provision of some services with the universal service area		
Use of potentially restrictive authorisation conditions	Univ. servs: Yes	Quality conditions: Yes	Competence: No
Access to postal infrastructure by competitors	Addr. database: No	Post office boxes: No	Delivery boxes: No
VAT: USP services exempt	---		
Customs: USP services subject to UPU customs rules	---		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: No	USP accepts inbound mail from EU/EEA ETOEs?: No answer	
Intra-EU remail restrictions	ABA remail: No answer	ABC remail: No answer	
Labour law: special rules in postal sector	No		

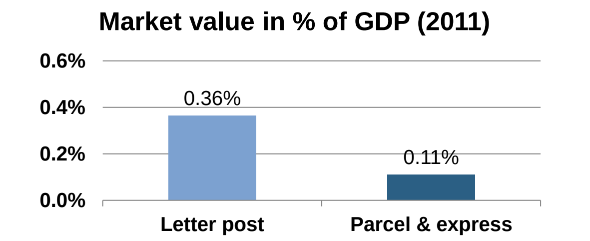
B.9 Protections of Users

Protection of users by law	Yes	Postal laws and/or regulations include user protection provisions.
Implementing authority(ies)	Postal NRA enforces user protection provisions for postal services	
Users of private operators covered	Within US: Yes	Outside US: Yes
Publication of annual statistics	By USP: No answer	By NRA: No answer
User complaints to USP reviewed, 2012	Percent of complaints (%): ---	

C. Market facts

C.1 Market size and demand (2011)

Letter post items per capita (EU-27 average)	454 (164)
Share C2X (revenue/volume)	12% (Volume)
Share B2X (revenue/volume)	88% (Volume)
Parcel & express items per capita	15
Share C2X (revenue/volume)	88% (n/a)
Share B2X (revenue/volume)	12% (n/a)



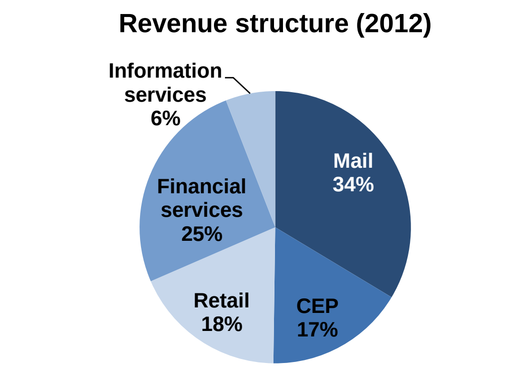
	Volume	Main developments since 2007
Domestic and inbound cross-border letter post	3,570m	Average growth rate 2007-2011: -3.9%
Outbound cross-border letter post	69.8m	Average growth rate 2007-2011: -22.6% Note: (USP data)
Domestic parcel & express	118.28m	
Outbound cross-border parcel & express	n/a	

C.2 Market structure and key market players

	TOP3 Market share	Perceived competition	Key players
Domestic letter post	100%	NRA: Marginal USP: Intense	Swiss Post (99.6%) Quickmail AG
Outbound cross-border letter post	99%	NRA: Moderate USP: Intense	Swiss Post (92.4%) DHL Global Mail (Switzerland) AG G3 Worldwide Mail AG
Domestic parcel & express (total)	97%	NRA: Moderate USP: Substantial	Estimated USP market share: 75-80%
B2C	n/a	NRA: n/a USP: Intense	Swiss Post
B2B	n/a	NRA: n/a USP: Intense	DHL, DPD, UPS
Outbound cross-border parcel & express	94%	NRA: n/a USP: Substantial	DHL/Deutsche Post Global Mail, DPD, Swiss Post, UPS

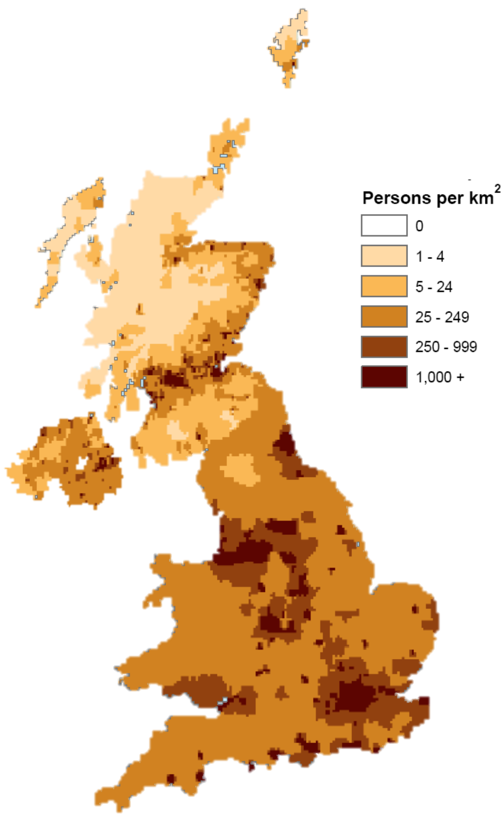
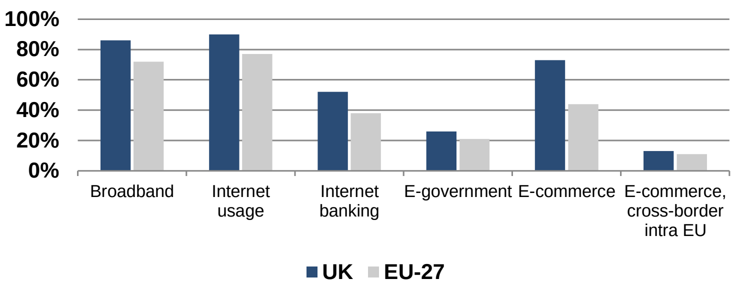
C.3 Schweizerische Post (2012)

Legal status	plc
State ownership	100%
Total revenue	EUR 7,120m
Share national revenue	88%
EBIT margin total / mail	10.4% / 5.7%
Employment, total (headcount / FTE)	n/a / 44,605
Share civil servants (headcount)	n/a
Share part-time	n/a
Share wage costs on total costs	53.7%



UNITED KINGDOM

A. Country facts

Total population (2012)	63.0m	**United Kingdom** 
Population density (2012)	253 / sqkm	
Urbanisation rate (2011)	80%	
GDP growth rate (UK / EU-27)	2010: 1.8% 2011: 0.9% 2012: 0.2%	
GDP per capita in PPS (2011) (in % EU-27 average)	27,400 (109%)	
Transparency International CPI 2012 Score (Max. 100)	74	
ICT indicators (2012)		
Online purchase per capita	EUR 1,258	Average growth rate (2007-2011): 10%

B. Regulation

B.1 Institutional Framework	
Ministry for postal policy	Department for Business, Innovation and Skills (BIS)
Ministry for ownership of PPO	---
National regulatory authority	The Office of Communications

B.2 Organization and Authority of NRA		
Head(s) of NRA	Number: 9	Appointed by: Postal Minister or ministry staff
NRA resources, 2012	Budget: 6216716	Professional staff: ---
NRA authority to levy fines	Yes	10% of turnover
NRA authority to order remedies	Yes	
NRA right to data from USP	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	
NRA right to data from non-USPs	Compliance data: Yes for all postal services; Statistics: Yes for all postal services	

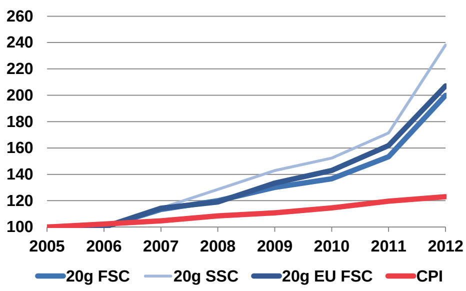
B.3 National Competition Autority			
National competition authority	Office of Fair Trading		
Primary authority for competition rules	Both NRA and NCA equally		
NRA/NCA cooperation	Share data: No	Regular consult: Yes	Coord agmt: ---
NCA decisions since 2009			
State aid cases	▪ N508/2010 – Post Office Limited (POL) Continuation of Network Subsidy Payment and Working Capital Facility ▪ SA.31479 – UK - Royal Mail ▪ SA.33054 – Compensation for net costs incurred to keep a non-commercially viable network for the period 2012-15 and the continuation of a working capital facility		

B.4 Scope of Universal Service			
Service	**Ensured**	**Price regulated**	**Service standards**
Single piece letter post (FSC)	Yes	Yes	Yes
Bulk letters	No	No	No
Bulk advertisements	No	No	No
Newspapers, magazines, etc.	No	No	No
Non-priority correspondence	Yes	Yes	Yes
Single piece parcels	Yes	Yes	Yes
Bulk parcels	No	No	No
Delivery frequency for LP	6 days per week		
Delivery frequency for parcels	5 days per week	Delivery point: Parcels must be delivered without charge to addressee	

B.5 Cross-border Services			
Agency implementing Postal Directive	NRA: ---	Second agency: ---	
EU v. UPU law, intra-EU	---		
EU v. UPU law, extra-EU	---		
Enforcement of Art. 13	Cost based TDs: ---	Related to QoS: ---	Transparent: ---
Discrimination with respect to inbound postal services of USP			
NRA prohibits discrimination between domestic mail and inbound intra-EU mail?	---		
NRA prohibits discrimination between inbound mail from different EU mailers?	---	TD regimes: ---	
NRA prohibits discrimination between inbound intra-EU mail and inbound mail from other industrialized countries?	Unknown, no information	TD regimes: ---	
Overalll net gain/ loss due to TDs not aligned to domestic postage	No answer		

B.6 Ensuring Universal Service			
Households at risk under market forces	Pop (%): ---	Volume (%) : ---	
Choice between market forces, designation, and procurement	Study: No	National USP appointed by legislation: Yes	
Method of ensuring US	Mkt force (%): ---	Designation (%): 100	Procurement (%): ---
Households not receiving US	Letter post (% pop): 0	Parcels (% pop): 0	
Net cost of US0 in 2012	Pct USP exp: ---	Net cost study: No	
USO financed from public funds	No		
USO financed from compensation fund	Authorized: Yes	Established: No	

B.7 Universal service indicators		
Price trend	**2010**	**2013**
20g FSC, domestic	EUR 0.48	EUR 0.74
20g SSC, domestic	EUR 0.37	EUR 0.62
20g FSC, EU	EUR 0.70	EUR 1.07
5kg parcel, domestic	EUR 11.17	EUR 16.43
5kg parcel, cross-border (lowest tariff)	EUR 31.01	EUR 38.22

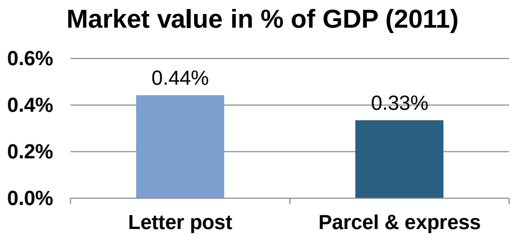


Quality of service	2010	2012	USP customer satisfaction index
Domestic target (D+1)	93%	93%	2010: 89% 2011: 85% 2012: 87%
Performance (D+1)	91.4%	92.2%	
Postal outlets (total)	11,905	11,818	
Postal outlets per 10,000 inhabitants	1.92	1.88	
Share post offices	3.1%	3.2%	

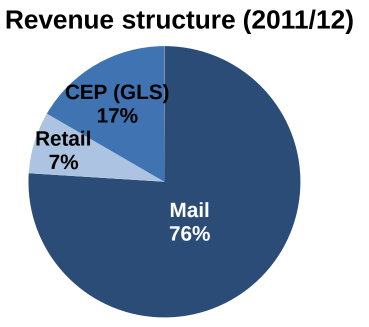
B.8 Legal Treatment of Competitive Services			
Special tariffs are transparent and non-discriminatory?	Bulk letters: ---	Direct mail: ---	Bulk parcels: ---
Special tariffs are available to other postal operators?	Bulk letters: ---	Direct mail: ---	Bulk parcels: ---
Licence required within US area	No authorisation required for provision of services with the universal service area		
Use of potentially restrictive authorisation conditions	Univ. servs: Yes	Quality conditions: Yes	Competence: No
Access to postal infrastructure by competitors	Addr. database: Yes	Post office boxes: No	Delivery boxes: No
VAT: USP services exempt	Single piece letters; single piece parcels; other;		
Customs: USP services subject to UPU customs rules	---		
ETOE restrictions	EU/EEA USPs s may establish ETOEs?: ---	USP accepts inbound mail from EU/EEA ETOEs?: ---	
Intra-EU remail restrictions	ABA remail: ---	ABC remail: ---	
Labour law: special rules in postal sector	No		

B.9 Protections of Users		
Protection of users by law	Yes	Postal laws and/or regulations include user protection provisions.
Implementing authority(ies)	Postal NRA enforces user protection provisions for postal services	
Users of private operators covered	Within US: Yes	Outside US: Yes
Publication of annual statistics	By USP: Yes	By NRA: ---
User complaints to USP reviewed, 2012	Percent of complaints (%): ---	

C. Market facts

C.1 Market size and demand (2011)		
Letter post items per capita (EU-27 average)	266 (164)	
Share C2X (revenue/volume)	8% (Volume)	
Share B2X (revenue/volume)	92% (Volume)	
Parcel & express items per capita	25-30	
Share C2X (revenue/volume)	n/a	
Share B2X (revenue/volume)	n/a	
	Volume	**Main developments since 2007**
Domestic and inbound cross-border letter post	16,599m	Average growth rate 2007-2011: -6.4%
Outbound cross-border letter post	486.68m	Average growth rate 2007-2011: 1.6% Note: (USP data)
Domestic parcel & express	1,850m	Note: (WIK estimate 2012)
Outbound cross-border parcel & express	n/a	

C.2 Market structure and key market players			
	TOP3 Market share	**Perceived competition**	**Key players**
Domestic letter post	100%	NRA: Marginal USP: Marginal	Royal Mail (100%) DX Group TNT Post UK
Outbound cross-border letter post	n/a	NRA: n/a USP: Low	n/a
Domestic parcel & express (total)	50%	NRA: Moderate USP: Moderate	Estimated USP market share:>20%
B2C	n/a	NRA: Moderate USP: Moderate	RoyalMail, Hermes, Yodel
B2B	n/a	NRA: n/a USP: Moderate	RoyalMail / Parcelforce Ltd., City Link, DPD UK, Interlink (Geopost)
Outbound cross-border parcel & express	n/a	NRA: n/a USP: n/a	DHL, Royal Mail Group

C.3 Royal Mail Group (FY 2011/12)		
Legal status	plc	
State ownership	100%	
Total revenue	EUR 10,983m	
Share national revenue	84%	
EBIT margin total / mail	2.2% /0.3%	
Employment, total (headcount / FTE)	176,242 / n/a (2012)	
Share civil servants (headcount)	0%	
Share part-time	n/a	
Share wage costs on total costs	62%	